

BROOKS FINANCIAL

*Since 1961,
the professionals at
Brooks Financial have
remained true to
three core ideals ...*

to help our clients define
their corporate and
personal financial goals,
to design creative
solutions to
achieve them,
and to maintain our
client relationships by
providing extraordinary
customer service.

BROOKS
FINANCIAL

30600 Northwestern Hwy, Suite 200
Farmington Hills, MI 48334

P 248.785.5200 • F 248.785.5210
BrooksFin.com



INSURANCE PLANNING

- Individual Life Insurance
- Individual Disability Insurance
- Fixed and Variable¹ Annuity Products
- Long-Term Care Insurance
- Critical Illness Insurance
- Business and Corporate Planning to Fund
 - Life Buy/Sell Agreements
 - Disability Buy/Sell Agreements
 - Business Succession Plans
 - Deferred Compensation Plans
 - Executive Bonus/Key-Person Protections



WEALTH MANAGEMENT²

- Financial Planning²
- Individual Retirement Accounts
- Retirement Funding
 - SIMPLE IRA Plans
 - 401(k) Plans
 - 403(b) Plans
 - SEP Plans
- 529 Higher Education Savings Plans¹
- Mutual Funds¹
- Money Management Platforms including²
 - Mutual Fund Wrap Accounts
 - Unified Managed Accounts
 - Separately Managed Accounts



EMPLOYEE BENEFITS

- Health Insurance
 - Group Insurance
 - Individual Insurance
 - Medicare Advantage/Supplement Plans
- Ancillary Services
 - Life Insurance
 - Dental Insurance
 - Short-Term Disability Insurance
 - Long-Term Disability Insurance
 - Critical Illness Insurance
 - Voluntary Benefits
 - Self Funded Drug Card Programs
- Integrated HR Solutions
 - Payroll
 - Premium Only/Sec. 125 Plans
 - Flexible Spending Accounts
 - COBRA Administration Programs
 - Family Medical Leave Act
 - Health Reimbursement Arrangements
 - Health Savings Accounts
 - Human Resource Information Systems

¹Jason E. Brooks, CA, Insurance Lic. #OB87061, is a Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency.

²Jason E. Brooks is a Financial Adviser offering investment advisory services through Eagle Strategies LLC, A Registered Investment Adviser. Brooks Financial is not owned or operated by NYLIFE Securities LLC or its affiliates.