

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.



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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.