

## INSURANCE PLANNING

### Individual Life Insurance

### Individual Disability Insurance

### Fixed & Variable<sup>1</sup> Annuity Products

### Long-Term Care Insurance

### Critical Illness Insurance

### Business & Corp. Planning to Fund:

- Life Buy/Sell Agreements
- Disability Buy/Sell Agreements
- Business Succession Plans
- Deferred Compensation Plans
- Exec. Bonus/Key-Person Protections

## WEALTH MANAGEMENT<sup>2</sup>

### Financial Planning<sup>2</sup>

### Retirement Funding

### Mutual Funds<sup>1</sup>

### Individual Retirement Accounts

### 529 Higher Education Savings Plans<sup>1</sup>

### Money Management Platforms

#### Including<sup>2</sup>:

- 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
- Premium Only/Sec. 125 Plans
- Flexible Spending Accounts
- Self Funded Drug Card Programs
- COBRA Administration Programs

### Retirement Funding

- SIMPLE IRA Plans
- 401(k) Plans
- 403(b) Plans
- SEP Plans



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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