



All-In-One Financial Plan



- Not like a CD, IRA, or 401k...
 - Your money is available any time with no penalties!
- If you are sick or hurt and can't work...
 - The plan provides protection benefits.
- Assist all academically qualified student in attending the college of choice!

Retirement example @ \$_____ per month.

Your age is _____. At age 65 your nest egg can be \$_____.

If you don't touch your nest egg, your monthly income for the rest of your life could be:

\$_____.

Surveyed by: _____ Date: ___/___/___ Time: _____ Am/PM

Name of Business: _____

Name of Person (print): _____ Age: _____

Signature: _____ M/F