

**Please check all areas you are interested in learning more about:**

- RETIREMENT FUNDING  
*Can we achieve our goals?*
- TAX-FREE INCOME SOLUTIONS  
*Where can I save money for retirement with tax-free access in the future?*
- MORTGAGE PROTECTION  
*Can we keep from losing our home if a breadwinner is disabled or worse?*
- LIVING BENEFITS  
*How can I access my life insurance death benefit while still living if I suffer a heart attack, stroke, or cancer?*
- EDUCATIONAL FUNDING  
*How do we pay for our children's education?*
- COVERAGE FOR CHILDREN  
*Can we obtain lifetime insurance coverage for our children?*
- ASSET PRESERVATION  
*Can we protect our assets from market volatility?*
- ESTATE DISTRIBUTION  
*Can we pass our assets to our heirs without the time and expense of probate?*
- SMALL BUSINESS PROGRAMS  
*How can I ensure that our business can stay in business if something happens to me or my business partner(s)?*

NAME: \_\_\_\_\_

AGENT NAME: \_\_\_\_\_

EMAIL: \_\_\_\_\_



Equis Financial has helped more than 100 thousand hard-working Americans protect their families against the unexpected loss or disability of a breadwinner. Of course, that's only part of what we do.

Our affiliate, Equis Advanced, equips our customers who are serious about long-term planning with safe savings and protection solutions that provide guarantees and peace of mind. Our Life Protection Specialists are trained to listen and understand your life's goals, offering customized recommendations that will help you make decisions that are right for you.

Equis Financial can help you meet a multitude of financial needs... from covering your first home's mortgage, to funding your children's education, saving for retirement, nursing care, or protecting your estate from unnecessary expenses and taxes.

**Our Family of Specialists  
Has A Wealth of Financial  
Management Solutions.**



**Equis Financial markets life insurance and fixed annuity products through a national network of licensed independent agents, also known as Life Protection Specialists.**

**YOUR AGENT'S CONTACT INFORMATION**

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**ADDITIONAL NOTES**

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**Your Family Has A  
Multitude of  
Financial Needs**



[www.equisfinancial.com](http://www.equisfinancial.com)



**EQUIS**  
FINANCIAL



## WE WILL HELP YOU

- ✓ Education
- ✓ Mortgage Protection
- ✓ Retirement
- ✓ Living Benefits
- ✓ Disability

*Turn to the same family of local financial professionals you've already come to know!*

*Listen to your needs and concerns.  
Provide you with local representation.*

For too long, hard-working Americans have been largely overlooked and underserved. They, like you, appreciate the importance of planning ahead, protecting your hard-earned assets, and saving for the future. But with so many insurance, annuity, and investment products to choose from, each designed with a particular purpose in mind, it's not easy to determine which is your best value.

Equis Advanced is dedicated to giving you the guidance you need to make these important decisions. Our sales professionals take time to listen.

*Design program options for today.  
Develop plans for tomorrow.*

What do you want to achieve? What kind of timetable do you have? Where's your financial comfort zone? We can show you which products and strategies work best in your situation.

We understand your busy schedule. That's why we still make house calls. We'll bring the information you need right to your door. The answers you need... the products you want... the professional service you deserve. We make it easy for you to take care of the things that matter most.

