

Achieving your long-term financial goals, both personal and corporate, starts with a clear plan.

BROOKS FINANCIAL

Brooks Financial specializes in Insurance Planning, Wealth Management, and Employee Benefits.

*Since 1961, Brooks Financial
has remained true to three
core ideals ... to help our
clients **define** their
personal and corporate
financial goals, **design**
creative solutions to achieve
them, and **maintain**
our client relationships
by providing
extraordinary
customer service.*



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

BROOKS
FINANCIAL

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.

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