

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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BrooksFin.com



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

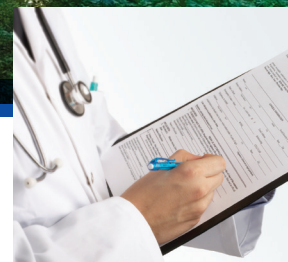
Mutual Funds¹

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.

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