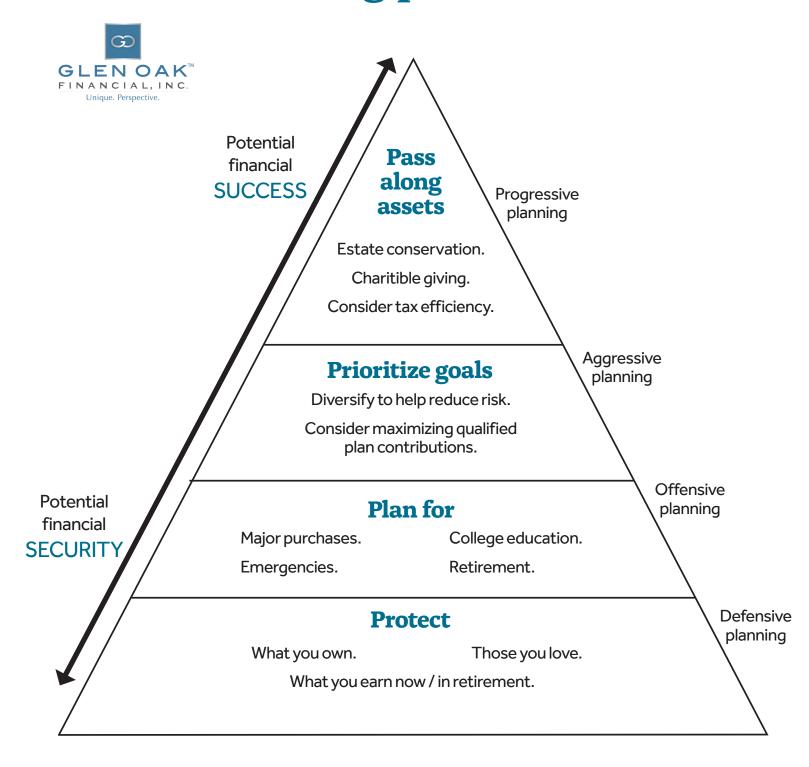
Financial building process worksheet



This is for educational purposes only and not intended as a recommendation for any particular product. All items may not pertain to your particular situation. Please seek tax advice from your tax advisor. Taxes are one of the many items that should be considered, when evaluating a financial product for your situation. AR07196A.022015 SMRU533474 (Exp.5.30.2025)

Dharmesh Goel, Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency 630-795-5000. Financial advisor offering investment advisory services through Eagle Strategies LLC, a Registered Investment Advisor. Glen Oak Financial, Inc. is not owned or operated by NYLIFE Securities LLC or its affiliates.