



Date: _____

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Daytime Phone: _____ Evening Phone: _____

Best time to call: _____ Email: _____

Primary Financial Concerns: _____

I WOULD LIKE TO KNOW MORE ABOUT

- I. _____ Retirement Planning?
- II. _____ IRA's and Tax Advantages?
- III. _____ Making the right decisions in my 401 K or 403b?
- IV. _____ Making Rollover Decisions?
- V. _____ College Planning?
- VI. _____ Estate Planning?
- VII. _____ Annuities, Life Income?
- VIII. _____ Reviewing My Insurance Portfolio? Life, Long Term Care, Disability, Health
- IX. _____ Strategies For Business Owners?
- X. _____ Refinancing My Home?

_____ I would like to meet and review my portfolio

Scan, email to; contact@farzadfinancial.com or Fax to (919)-806-4869