

**Personal Financial  
Strategy Survey**

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_  W  H  C

Email: \_\_\_\_\_

Are you an  Employee  Self-Employed  Business Owner

Name of Company: \_\_\_\_\_

I AM INTERESTED IN

- Building Financial Security for my family
- Learning how to Maximize my Retirement Plan
- Building Tax-Free Retirement Income
- Building Guaranteed Lifetime Income
- Planning for my Children's College Fund
- Paying off my Mortgage and be Debt Free
- Having a Complimentary Financial Needs Analysis
- Learning how to Preserve my Estate and Maximize Wealth Transfer

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**Key Steps to Financial  
Freedom**

A Financial Plan is like building a home, there are basic steps to follow.

*You have to Plan it.*

*You have to Implement it.*

*You have to Complete it.*

***If you don't have a Financial Plan,  
you have "NO" Foundation for  
Financial Growth.***



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**Global America  
Financial Brokerage**



**GAF**

***Safely Create, Build  
& Protect Wealth***



**GAF is an Independent  
Financial Services Firm  
offering financial  
based products & concepts  
to the American People.**

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## **GAF Objective**

TO EDUCATE AND EMPOWER  
AMERICAN FAMILIES & BUSINESSES

## **GAF Goals**

- ◆ To provide solutions that address the unique financial challenges for each individual, family and business
- ◆ To build a solid and reliable financial plan for our clients
- ◆ To enable our clients to take control of their financial future

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## **GAF Services**

Tax-Free Retirement Planning  
Commercial/Business Insurance  
Protection of Family  
Elimination of Debt  
Auto/Home Insurance Savings  
Income/Asset Protection  
College Funding  
Emergency Fund  
Life Insurance  
Annuities  
Mortgage Protection  
Financial Help for Parents  
Preserving your Estate  
401(k), IRA, Roth IRA, 403(b), 457 Rollovers  
Disability Insurance, Cancer & Long Term  
Care Insurance  
Medicare, Final Expense and Senior Products  
Buys Sell Agreements, Key Man, Executive  
Bonus, Business Continuation Plans

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***“People don’t plan to fail...  
they just fail to plan”***

## **Return Appointment**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Location: \_\_\_\_\_

Agent: \_\_\_\_\_

Global America Financial Brokerage LLC (GAFB) is an Independent Financial Services Firm offering safe-money, cutting-edge financial based products and concepts to educate and empower Americans. GAF provides solutions to help agents address the unique financial challenges for individuals, families, and businesses. We help our agents strategically build solid but more importantly, reliable plans and programs for their clients