BUILDING A FINANCIAL PLAN

Personal service; Professional results.

ELGA
WEALTH MANAGEMENT
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ELGA Investment and Insurance Services Inc.

is a credit union operated and member oriented investment advisory and financial planning firm based in Flint, Michigan. The program was started in 2002 in an effort to be different from the traditional firms, brokers, and insurance agents you see today.

Why should you use an ELGA Adviser?

This office is neither a captive insurance agent nor a wire-house broker. It is a fully independent insurance and securities branch office. We can offer most any security and insurance product and are not handicapped into thinking annuities and mutual funds are the end all to financial planning or investments. Nor are we restricted by our parent companies or alliances.

Let's build your financial future together.

The path towards your financial future requires a clear vision, a detailed plan, and a dynamic approach. We construct powerful plans for building and retaining wealth. Our innovative approach includes investment strategies, retirement planning, and legacy planning.

We Will Discuss Your:

Investment Experiences
Goals / Lifestyle / Values
Short and Long Term Plans
Risk Tolerances
Major Concerns

✓ What we need from you...

Work /Employer Information

- ☐ Paystubs
- ☐ Benefits Coverage
- ☐ Pension Confirms / Estimates
- ☐ 401(k) / 403(b) / 457 Statements

Personal Information

- ☐ Social Security Estimate(s)
- ☐ Monthly Budget
- ☐ Mortgage / Loan(s) Balances
- ☐ Life Insurance Type / Amounts
- ☐ Health Insurance Coverage

Statements

- ☐ Bank/ Credit Union
- ☐ CD's
- ☐ Stock/Bonds/Mutual Funds
- ☐ Annuity Statements
- ☐ Investment Choices

Step 1
Initial:
Question
Answer
Data Collection

Step 2
Clarify
Analyze
Forecast

Step 3
Assess:
Strengths Weaknesses
Taxes
Risks

Step 4
Recommendations
Fix
Change
Establish

Step 5
Account:
Creation
Funding