

# FINANCIAL REVIEW MATERIALS

Personal service; Professional results.

## ELGA Investment and Insurance Services Inc.

is a credit union operated and member oriented investment advisory and financial planning practice 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.

- Locally Owned and Operated - Not a Franchise
- Independent - Putting Client Interests First
- Broad array of Products and Services
- Experienced - Tax and Income Specialties
- Qualified - Credentialed and Referred
- Complimentary Trust Funding and Client Reviews

### We Will Discuss:

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

# ELGA

## WEALTH MANAGEMENT

[www.elgawealthmanagement.com](http://www.elgawealthmanagement.com)

810-600-4444

## ✓ Please Bring with 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

