

# Financial Information Form Script

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At Asurea, we are a full service insurance broker meaning we help our clients with much more than just mortgage protection, including retirement, disability, Medicare supplement coverage and long term care coverage.

- When was the last time you reviewed your account?
- When was the last time you spoke with your agent?
- How much are you paying in fees?
- How much money have you gained or lost in the past year?
- Are you aware that there are retirement products that have guaranteed income for life?
- Do you know that there are products on the market that allow substantial upside gains without any downside risk?

We have a retirement specialist in our office who is able to review your retirement plan to help you understand what you have and how it has been doing. He will do a comparison of what you have and what else is available.

There are many companies that offer these kinds of accounts and the worst thing that can happen is he can tell you that you are in a good plan and that there is no room for improvement, but at least you will have a better understanding of what you have. He can see you (Day) or (Day) which is best for you?

Make sure you have your statements available when you meet with him so you can have them reviewed which will save you both some time.