



## INDIVIDUAL REQUEST FOR INFORMATION

Complete form and fax to NICHE FINANCIAL SERVICES (610)- 834-1490

I am interested to learn more about ... (please check all that apply)

**Medicare/Medicaid**

I would like to learn more about my options concerning these services.

**Life Insurance**

Whole Life  Variable Life  Universal Life  Term Life Insurances

I would like to talk to you about one of these programs.

**Tax Planning**

I would like to review my tax situation

Can I reduce my income tax burden?

**Long Term Care Planning**

If I need a nursing home, what would be my options?

Medicare/Medicaid/Long Term Care Insurance/Pay the Bill for Myself?

**Investments**

I would like to review my Investment Policy Statement

Mutual Funds, Annuities, CD's, Individual Stocks, Other.

**Free Seminar** – I would like you to return to conduct a seminar on one of the preceding topics.

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

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

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

All replies to this confidential survey will be held in the strictest of confidence.