

**INDIVIDUAL REQUEST FOR INFORMATION**

**Complete form and fax or email to NICHE FINANCIAL SERVICES**

**fax (610)- 834-1490 or** [**administrative@nichefinancial.com**](mailto:administrative@nichefinancial.com)

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

**Personal Insurance** Review for cost and efficiency   
 I want to make sure I’m not paying too much or have the wrong coverage

**Medicare/Medicaid**  I would like to learn more about my options concerning these services

**Life Insurance**  Whole Life Variable Life Universal Life Term Life Insurance 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? What about my parents? Medicare/Medicaid/Long Term Care Planning

**Investments**

I would like to review my Investment Policy Statement I have money at an old employer  
 Mutual Funds, Annuities, CS’s, Individual Stocks, Other

**Individual Retirement Accounts (IRA)/Company 401(k) Plan/Rollover**

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

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

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