

Get Started Today!

Be Sure You're on Your Way – With a COMPLIMENTARY FNA!



What takes as long as watching one 30-minute television sitcom and yet can be indispensable in helping you achieve your financial goals and dreams? Primerica's Financial Needs Analysis (FNA) has, for decades, helped families understand just what they must do to achieve their financial goals. And it's true – you can get started in just a half-hour. A small investment of your time can help you make a real impact on your financial future.

Getting Started is Easy!

1. Set a Follow up appointment.

Important Information to Have:

2. To help you get an accurate picture of your current financial health, make sure you have the following important information handy for your Primerica representative:

- Your 2 latest pay stubs
- All savings and investment account statements (Non-Retirement) (Annual Stmt. if possible)
- Most Recent Retirement & Co. Benefit statements (401k -403b-TSA-IRA-Roth IRA-ETC.)
- Life insurance policies (**Actual Policies & Current Statements**)
- Education savings statements
- Financial aid and tuition amounts
- Mortgage documents and Current Statements
- Loan and credit card statements

The FNA is **complimentary and personalized**, therefore your results will be **tailored** specifically to **you**. Once you have an idea of where you stand, your Primerica representative can help you come up with a strategy to fix problem areas. You deserve a bright financial future. The complimentary FNA is the first step toward the life of your dreams. We are excited to help you today!