BALANCE YOUR WELLNESS I WEALTH I WORK

EASIER:



HARDER:



401 (a), 403 (b), ROTH?

Confidence on which to maximize FIRST



Debt free timeline

Ideal for wealth with guilt-free budget



Family Assistance

Education planning, gifting, inheritance



Annual Updates

Benefits, employer and life changes



Protection

Life, health, disability, auto, home, umbrella



Investments

Matching your liquidity, risk, value



Retirement

Match pension, social security, & income goals



Estate

Inheritance, Windfall, Charitable giving



MOVE WITH CLARITY, CONFIDENCE, AND CARE

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Taylor



Desiree



Joseph

Please contact your Eagle Investment Advisor Representative to discuss your investment objectives before making any investment decisions for your Eagle accounts

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