



30 minutes is all it takes
to get on the road to
changing your financial
situation and your life.

Preparing your Financial Needs Analysis is a process that requires the cooperation and input of your spouse or partner. It's important that he or she be present for your appointment.

My FNA appointment will be:

Day _____ Date _____

Time _____

With _____



www.primerica.com

Primerica representatives market term insurance underwritten by the following affiliated companies in these respective jurisdictions: National Benefit Life Insurance Company (Home Office: Long Island City, NY) in New York; Primerica Life Insurance Company (Executive Offices: Duluth, GA) in all other U.S. jurisdictions; Primerica Life Insurance Company of Canada (Home Office: Mississauga, ON) in Canada. Registered securities licensed representatives sell securities through PFS Investments Inc. in the U.S., and PFSL Investments Canada, Ltd., in Canada.

© 2003-2012 Primerica
A8862 / 45362 / 96PFS64-72 / 11.12

30 Minutes
Could Change Your Life



If you're like many people, you're in the dark about your finances. You pay your bills each month and do your best to prepare for the future. But the truth is, there's only so much money to go around and preparing for the future can be overwhelming.

Primerica can help. A complimentary **Financial Needs Analysis (FNA)** can help you bring your current financial situation to light. It can show you where your finances stand today and what you need to do to prepare for tomorrow.

Who Could Benefit from an FNA?

- Anyone with children
- Anyone with debt
- Anyone who plans to retire someday
- Anyone who lacks a strategy for financial independence

Here's an overview of the FNA's five basic sections and the information you'll receive from each:

Debt Solutions

Illustrates strategies for paying off credit cards and loans in the quickest, most efficient manner possible with little or no additional cash outlay.

Saving For Retirement

Offers scenarios to show you how much money you need to set aside for retirement.

Education Funding

Projects actual costs for specific schools you select, then shows you several strategies for funding your children's education expenses.

Income Protection

Offers a variety of strategies to ensure your family's financial future should you die prematurely.

Building Your Financial Future

Pulls all your information together by outlining specific steps to put your plan into action.



The Process Is Easy

Simply have the following documents on hand so your representative can provide you with an accurate picture of your current financial situation:

- Recent paycheck stubs
- Checkbook register
- Savings and investment account statements
- Retirement plan statements
- Company benefit statements
- Life insurance policies
- Mortgage statements
- Education savings statements
- Financial aid and tuition statements
- Loan and credit card statements

Primerica: Dedicated to Families

Millions of families have benefited from receiving a complimentary FNA. Your family can too. Primerica's proven financial concepts can forever change the way you think about and manage your money.

Your representative will work with you every step of the way – from explaining the details of your results to customizing financial solutions to help you put your plan in motion.

Every family deserves financial security and peace of mind. Contact a representative today to schedule an appointment.