

# FREE Portfolio Review

Remove or copy and complete this form and return it to us by fax or mail for a free analysis and consultation.

Name: \_\_\_\_\_ ID#: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_

Phone #'s: \_\_\_\_\_

Best time to be reached: \_\_\_\_\_

## I would like help with the following:

- Setting up or analyzing retirement plan(s)
- Opening a Retirement Plan for my business
- College Funding for my children/family
- Investing for Current Income
- Review of 401(k), 403(b) or other retirement plan
- Investing in Mutual Funds
- Transferring or Rollover of IRA or retirement account
- Review of my Investment Portfolio
- Where to invest in 2025

## Savings (IRA, 401(k), CDs, etc.):

- 0 - \$10,000
- \$10,001 - \$50,000
- \$50,001 - \$100,000
- \$100,001 - \$500,000
- \$500,001 +

## Investment Goals:

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**Fax to:** 407-253-4148

**Mail to:** IAS Financial  
Portfolio Review  
P.O. Box 915109  
Longwood, FL 32791

