

BANKER
INVESTMENT
GROUP

Confidential Request Form

Address: _____

Telephone: _____

We will not sell or rent your name or contact information to any 3rd party.

Increase your chances of reaching your investment goals!

At Banker Investment Group, you come first. We strive to put you, the client, in the financial position necessary to achieve your life goals. Clients are charged on a fee-only basis, which eliminates the conflict of interest associated with commission-based advising.

Request Your FREE Investment Review TODAY!

Please indicate your level of interest:

- YES!** I am interested in receiving a free investment portfolio review; please contact me to set up my free appointment.
- YES!** I am interested in meeting with you to review my portfolio and investment goals; I will be in contact with you to set up my appointment at my convenience.

Current Investment Accounts:

- Individual Trust Custodial Annuity Personal/Business Retirement

Total Investment Size:

- \$0 – 200,000 \$200,000 – 500,000 \$500,000 – 1,000,000 \$1,000,000+

Please fax this request form to (765) 464-0308 or call (765) 497-0197 to set up your FREE investment portfolio review.

Banker Investment Group

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Website: www.bankerinvestmentgroup.com • E-mail: bbanker@bankerinvestmentgroup.com