

Asset Protection

I have an adequate amount of life insurance in place to provide cash & income needs for me and members of my family in the event that one of us dies prematurely.

yes no unsure

I believe that I would have an adequate amount of income if I became disabled.

yes no unsure

My assets would be adequately protected if I needed long term nursing care.

yes no unsure

Asset Accumulation

I have enough short term cash for emergencies.

yes no unsure

I am confident my portfolio is properly diversified.

yes no unsure

I am saving enough ensure a comfortable retirement.

yes no unsure

I am saving enough toward college education for my children or grandchildren.

yes no unsure

Please list any additional concerns you would like to discuss: _____

Wealth Distribution

At retirement, I know where my income will come from.

yes no unsure

A substantial portion of my retirement income is secure.

yes no unsure

I have a plan for charitable giving.

yes no unsure

Asset Transfer

I have properly executed wills/trusts that are current and properly funded.

yes no unsure

The ownership of my assets and beneficiary designations are correctly coordinated with my estate plan.

yes no unsure

My Trustees and/or Family are up to date with my estate plans.

yes no unsure

Why Choose us?

Wise money management is essential to achieve your financial goals. There are certainly many investment options available to you. Because of all these options, it is important that you invest where you feel comfortable.

Utilizing the resources of Infinex Financial Group located at The Milford Bank, we offer access to high quality, professional investment and insurance products. These include mutual funds, stocks, municipal and government bonds, annuities and life insurance.

You should know that unlike some big banks or investment houses, Infinex does not sell its own products. Instead, we make independent choices from various investment and insurance companies. Because of this, we have no selfish reason to steer you into a particular investment recommendation.

Whether you are planning for retirement, putting a child through college, providing a pension plan for a business or simply growing your wealth, we can help.

Our investment philosophy is to help you find investment alternatives to reach your financial goals at a risk level with which you feel comfortable. We never forget that our customers are also our neighbors.

We want your investments with Infinex Financial Group located at The Milford Bank to be the best investments you have ever made. So invest a little time now and contact our Financial Services Manager, John Kuehnle at (203) 783-5782 or jkuehnle@infinexgroup.com.