



A member of the MassMutual Financial Group

REQUEST FOR INFORMATION

If you would like additional information, please complete the form.
You may then fax or email it with a copy of this cover page to
Courtney Kulp.

Courtney Kulp
Director of Marketing
PennWood Financial Group
Fax: 610-291-7216
Email: ckulp@financialguide.com



REQUEST FOR INFORMATION

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PERSONAL INFORMATION

Name: _____

Phone: (H) _____ (C) _____ (W) _____

Email: _____

Address: _____

City: _____ State: _____ Zip: _____

Marital Status: Married Widowed Divorced Separated Single

Dependent(s) Name: _____ Age: _____

Name: _____ Age: _____

Have you received professional guidance for your dependent(s) Special Care Needs? _____ Yes _____ No

WOULD YOU LIKE TO RECEIVE INFORMATION ON:

- _____ Government program integration such as the ABLE Act
- _____ Coordinating assistance programs
- _____ Prepare a letter of intent
- _____ Identify guardianship needs
- _____ Identify financial resources and uncover potential planning pitfalls
- _____ Determine current & future care costs
- _____ Discuss appropriateness of a Special Needs Trust
- _____ Identify trustees, guardians and future caregivers

Please briefly explain how we may assist you: