

SEMINAR DATE _____

RETIREMENT PLANNING SEMINAR

NAME: _____ SPOUSE: _____

DATE OF BIRTH: _____ DATE OF BIRTH: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

HOME PHONE: _____ WORK PHONE: _____

EMAIL: _____

1. TOPICS THAT I ENJOYED:

- Quality of the information
- Case Studies & examples
- Professional expertise of presenter

2. TOPICS I WOULD LIKE TO DISCUSS IN MY APPOINTMENT:

- Tax-deferred investing
- Retirement strategies
- Estate conservation
- Long-term Care
- Tax-reduction strategies
- Cash management
- Risk management
- Investment strategies

3. CURRENT AVAILABLE INVESTABLE ASSETS:

- < 250k
- 250K-500K
- 500K-1,000,000
- 1,000,000+

4. NAMES OF PEOPLE WHO YOU THINK MAY BENEFIT FROM THIS PRESENTATION:

Name	Address/City/State/Zip	Phone Number
_____	_____	_____
_____	_____	_____
_____	_____	_____



Free Consultation- A FREE, No Obligation consultation is offered to those attending this seminar

_____ Yes, I would like a FREE, No Obligation consultation

_____ No, I am not interested at this time, but please add me to your mailing list

Appointment (Please circle the best day and time for you)

Monday	9:00am	10:00am	11:00am	1:00pm	2:00pm	3:00pm	4:00pm	5:00pm
Tuesday	9:00am	10:00am	11:00am	1:00pm	2:00pm	3:00pm	4:00pm	5:00pm
Wednesday	9:00am	10:00am	11:00am	1:00pm	2:00pm	3:00pm	4:00pm	5:00pm
Thursday	9:00am	10:00am	11:00am	1:00pm	2:00pm	3:00pm	4:00pm	5:00pm
Friday	9:00am	10:00am	11:00am	1:00pm	2:00pm	3:00pm	4:00pm	5:00pm