

DATE: \_\_\_\_\_



NAME: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

DOB: \_\_\_\_\_

DOB: \_\_\_\_\_

CELL & WORK PHONE \_\_\_\_\_

CELL & WORK PHONE \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

PREFERRED METHOD OF COMMUNICATION:

- EMAIL                       CALL                       TEXT

TOPICS THAT I ENJOYED:

- Quality of the information       Case studies and examples       Professional expertise of presenter

TOPICS I WOULD LIKE TO DISCUSS IN MY APPOINTMENT:

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

CURRENT AVAILABLE INVESTABLE ASSETS:

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

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

MONDAY	9:00AM	10:00AM	11:00AM	1:00PM	2:00PM	3:00PM	4:00PM
TUESDAY	9:00AM	10:00AM	11:00AM	1:00PM	2:00PM	3:00PM	4:00PM
WEDNESDAY	9:00AM	10:00AM	11:00AM	1:00PM	2:00PM	3:00PM	4:00PM
THURSDAY	9:00AM	10:00AM	11:00AM	1:00PM	2:00PM	3:00PM	4:00PM
FRIDAY	9:00AM	10:00AM	11:00AM	1:00PM	2:00PM	3:00PM	4:00PM