

DATE: _____



NAME: _____

SPOUSE NAME: _____

EMAIL: _____

EMAIL: _____

DOB: _____

DOB: _____

CELL & WORK PHONE _____

CELL & WORK PHONE _____

ADDRESS: _____

PREFERRED METHOD OF COMMUNICATION:

- EMAIL CALL

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

CURRENT AVAILABLE INVESTABLE ASSETS:

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

____ Yes, I would like a FREE, No Obligation review

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

Please choose two

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