

**YOUR RETIREMENT AND TAXES**

***Please complete and turn in after this course.***

**Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_ Age: Phone: (\_\_\_\_\_\_) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Address: City: State: Zip: \_\_\_\_\_\_\_\_\_\_\_**

**Presenter: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Did this course meet your expectations?** YES SOMEWHAT NO

1. **Overall ratings:**

*Excellent Fair Poor*

5 4 3 2 1

***Value of Information:***

5 4 3 2 1

***Clarity of Information:***

To schedule your complimentary strategy session, please indicate your **1st** and **2nd** choice next to the time slots below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mon, Week 1** | **Tue, Week 1** | **Wed, Week 1** | **Thur, Week 1** | **Fri, Week 1** |
| * 9am | * 9am | * 9am | * 9am | * 9am |
| * 10:30am | * 10:30am | * 10:30am | * 10:30am | * 10:30am |
| * 1:00pm | * 1:00pm | * 1:00pm | * 1:00pm | * 1:00pm |
| * 2:30pm | * 2:30pm | * 2:30pm | * 2:30pm | * 2:30pm |
| * 4:00pm | * 4:00pm | * 4:00pm | * 4:00pm | * 4:00pm |
| * 5:00pm | * 5:00pm | * 5:00pm | * 5:00pm | * 5:00pm |
|  |  |  |  |  |
| **Mon, Week 2** | **Tue, Week 2** | **Wed, Week 2** | **Thur, Week 2** | **Fri, Week 2** |
| * 9am | * 9am | * 9am | * 9am | * 9am |
| * 10:30am | * 10:30am | * 10:30am | * 10:30am | * 10:30am |
| * 1:00pm | * 1:00pm | * 1:00pm | * 1:00pm | * 1:00pm |
| * 2:30pm | * 2:30pm | * 2:30pm | * 2:30pm | * 2:30pm |
| * 4:00pm | * 4:00pm | * 4:00pm | * 4:00pm | * 4:00pm |
| * 5:00pm | * 5:00pm | * 5:00pm | * 5:00pm | * 5:00pm |

Please indicate the approximate value of your retirement savings (excluding your primary residence):

|  |  |  |
| --- | --- | --- |
| * $250,000 or less | * $250,000-$500,000 | * $500,000-$750,000 |
| * $750,000-$1M | * $1M-$2M | * $2M+ |