

**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.

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| **Mon, Week 1** | **Tue, Week 1** | **Wed, Week 1** | **Thur, Week 1** | **Fri, Week 1** |
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| **Mon, Week 2** | **Tue, Week 2** | **Wed, Week 2** | **Thur, Week 2** | **Fri, Week 2** |
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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+
 |