**Today’s Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PLEASE COMPLETE THIS WORKSHEET DURING THE WORKSHOP**

**ATTENDEE(S) INFO:**

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

Spouse’s Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Best Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Best Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thank you for joining us for this workshop! Please complete the top of this page and use this rest of this page to follow along with the presentation and mark areas that you have questions or concerns as the workshop moves along. We’ll address questions at the end of the presentation.

1. **Inflation Protection**
2. **Taxes Strategies**
3. **Social Security Claiming Strategies**
4. **Market Volatility**
5. **Fees**

**Q1) What is your biggest concern about retirement?**

**Q2) What is the most valuable item you learned with us?**

Turn Over For Final Questions and Appointment Schedule

**Employment Info & Status:**

Occupation(s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ Working \_\_\_\_\_\_\_\_\_\_ Retired

Married | Divorced | Single | Widowed (choose all that apply)

**Account Info** (check the box for any that you currently own)

□ CD’s □ Mutual Funds □ Annuity(ies) □ Stocks □ Life Insurance

□ Retirement Plan (IRA/401k/Roth □ Long Term Care Insurance



**Approximate Retirement Savings (check one)**

□ $100,000 or under □ $100,000 - $300,000 □ $300,000 - $500,000 □ $500,000+

**When would you like to hold your COMPLIMENTARY consultation?**

**MEETING INFORMATION:**

**Preferred Meeting Type:** □ Virtual (on your computer) □ In-Office

**Please select from the following options for your meeting (please circle at least two):**

□ DATE 1: 12PM I 1 PM I 2 PM I 3 PM I 4 PM

□ DATE 2: 12PM I 1 PM I 2 PM I 3 PM I 4 PM

□ DATE 3: 12PM I 1 PM I 2 PM I 3 PM I 4 PM

□ DATE 4: 12PM I 1 PM I 2 PM I 3 PM I 4 PM

□ DATE 5: 12PM I 1 PM I 2 PM I 3 PM I 4 PM

No thanks: I would not like to schedule a meeting at this time.

Additional Information: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_