

THE TAX-FREE

EVALUATION

RETIREMENT PATH

YOUR INFO

First Name

Last Name

Email

Best Phone

Partner's First Name

Partner's Last Name

Email

Best Phone

Topics I Am Most Interested In

- | | | |
|---|--|--|
| <input type="checkbox"/> Tax Scorecard | <input type="checkbox"/> Tax-efficient Retirement Strategies | <input type="checkbox"/> Retirement Income Plan |
| <input type="checkbox"/> Social Security Analysis | <input type="checkbox"/> Legacy/Inheritance Planning | <input type="checkbox"/> Assessing My Tax Risk |
| <input type="checkbox"/> Assessing my Market Risk | <input type="checkbox"/> Assessing My Longevity Risk | <input type="checkbox"/> Assessing My Inflation Risk |

Other

What stood out to you most in our presentation?

What could we have done better?

I would like to set up a visit for my Tax-free Analysis

- | | |
|--|----------------------------------|
| <input type="checkbox"/> Yes, Definitely | <input type="checkbox"/> Not Yet |
|--|----------------------------------|