

Workshop feedback

Let us know what you think

- Do you feel attending today's workshop was a good use of your time? Yes No
- Was the information presented today helpful? Yes No
- Did the presenter(s) do a good job of delivering the content? Yes No
- Did you like the location? Yes No
- Would you attend future presentations on this topic or others? Yes No

Overall comments/suggestions:

I'm interested in (check all that apply):

- Saving for retirement/retirement income options
- Saving for college
- Protecting my loved ones financially
- Protecting my income
- Leaving a legacy
- Reviewing my overall financial strategy

I own a business and am interested in (check all that apply):

- Solutions to protect my business
- Business succession planning
- Solutions to recruit, reward, retain and retire key employees
- How my business can provide retirement income
- Group insurance benefits (life, disability, dental, vision, critical illness, accident)
- Qualified retirement plans

Your contact information:

Name _____

Address _____

Phone _____ Email _____

- Please contact me to answer my questions or schedule a time to discuss my specific situation.
- Please invite me to future presentations.

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