



THANK YOU

for joining us for
today's presentation!

Please help us improve future events by providing your feedback on today's presentation.

Name: _____

Email: _____

Phone: _____

Based on today's presentation, when it comes to planning for my financial future, I believe I am:

- Well prepared to achieve my goals
- On the right track but may need additional planning.
- Non prepared and need help to achieve my goal
- Other (please clarify)

Based on today's presentation, when it comes to wealth planning, I believe my existing wealth plan:

- Is in great shape; no changes necessary
- It on the right track but could use some additional work
- Is non-existent, and I would like to get started on it
- Other (please clarify)



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Based on today's presentation, are there any specific topics or concerns you would like to discuss?

Yes (please clarify)

No, I'm all set

Would you like to receive additional information regarding your wealth plan or any other concerns?

Yes

No

Please provide any additional feedback about today's presentation. The good and the bad; we would like to hear it all in order to improve future events.

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