



## FINANCIAL WORKSHOP RESPONSE CARD

Full Name:

Marital Status:

Street Address:

Cell Phone:

City, State, Zip Code :

Income:    Less Than \$30k ☐    \$30k-\$50k ☐  
                         \$50k-\$100k ☐    \$100k+ ☐

Who Invited You:

Today's Date:

I wish to take advantage of a FREE CONSULTATION and ANALYSIS ☐ YES ☐ NO

### I would like to meet concerning the following:

(☒ *all that apply*)

- ☐ A comprehensive analysis of my current portfolio and advantages of converting to an Indexed plan
- ☐ Tax-exempt retirement alternatives to IRA's, 401K's, etc.
- ☐ I want a second opinion on my current retirement plan

### Best day and time to meet:

Mon    Tues    Wed    Thurs    Fri    Sat    Sun  
Time:    :    am/pm    -    :    am/pm

### Comments:



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