



SEMINAR QUESTIONNAIRE

Today's Date: / /

Your Name:	Occupation:
Spouse Name:	Occupation:
Address:	
City:	Zip:
Phone: H) _____	W) _____ Cell) _____
By giving us your telephone information you are authorizing someone to call you to schedule an appointment. We <u>will not</u> call you if you mark the not interested box below.	
E-Mail (Please print neatly):	
Who Invited You:	

I am between the ages of 25 & 34 35 & 44 45 & 54 55 & older

Areas of Interest

- I am interested in **protecting my money against stock market losses.**
- I am interested in **retirement planning.**
- I am interested in **lifetime income planning.**
- I am interested in **maximizing my pension.**
- I am interested in **maximizing my social security.**
- I am interested in **life insurance and/or long term care.**
- I am interested in **college planning.**
- Check this box if you want to be added to **our email list** for **exclusive financial planning tips, free training classes, and company and industry news and updates.**
- I know of another organization looking for a **donation.**

Name _____ Phone _____

Name _____ Phone _____

- I am interested in your **employment opportunity.**
- I am not interested - **by marking this box we will not contact you by phone.**

Best time for an appointment - Date: _____ Time: _____

Please circle one: Your Home / Our Office / Other _____