HouseholderGroup
Estate & Retirement Specialists

Seminar Date ______________________________

Seminar Location ___________________________

PLEASE TAKE A MOMENT
TO COMPLETE THIS SEMINAR QUESTIONNAIRE

Print Name ____________________________________ Spouse ______________________________

Address __________________________________City_____________State________ Zip ___________

Home Phone (_____)______________________ Cell Phone (_____)____________________

Would you like to receive our educational newsletters and be invited to future educational events?
If so, please provide us with your email address: E-Mail Address __________________________

Date of Birth _____________ Age: ____ Spouse Date of Birth _________________ Age: ______

Name of company you now work for or have retired from: ___________________________________

CONFIDENTIAL FINANCIAL PLANNING INFORMATION

IRA/401k: ❑ Less Than $100,000 ❑ $100,000-$250,000 ❑ $250,000-$500,000 ❑ $500,000+

Net Worth: ❑ Less Than $750,000 ❑ $750,000-$2,000,000 ❑ over $2,000,000

Please check the appropriate boxes during the seminar:

My Main Areas of Interest are:

1. ❑ Pension Maximization
2. ❑ Social Security Benefits Review
3. ❑ Retirement & Distribution Strategy
4. ❑ Independent Investment Review
5. ❑ Tax Planning Review
6. ❑ 401K, 403B, 457
7. ❑ Inherited IRA
8. ❑ Self-Directed IRA
9. ❑ Tax Deferred Investment
10. ❑ Custodian Beneficiary Review of Qualified Accounts
11. ❑ Long Term Care
12. ❑ Living Trust
13. ❑ Estate Plan Review
14. ❑ Advanced Estate Planning
15. ❑ Charitable Giving

❑ **YES, I want to schedule a Complimentary consultation. Preferred Day/Time:** ______________

❑ **I know additional people who might also like to attend this seminar:**

1. __________________________ 2. _____________________________

3. __________________________ 4. _____________________________

❑ **I would like to schedule a speaker for my club, church, or organization.**

Name of Group: ____

Any comments on the seminar presentation? ____

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