

HELP US HELP YOU PROTECT YOUR FAMILY

PROTECTED BY ATTORNEY-CLIENT PRIVILEGE

Spending 2-3 minutes to complete this evaluation will help us get a better understanding of your goals and enable us to save you time when planning.

Date _____ Referred by _____ Initial so we can share this with them _____

Name _____ D.O.B. _____

Single Married Widow(er)

Spouse _____ D.O.B. _____

Address _____ City _____ State _____ Zip _____

Preferred Phone _____ Home Cell Work Email _____

Please indicate the effectiveness of the presenter/s by circling the appropriate number

	Excellent				Needs Improvement
Rapport with participants	5	4	3	2	1
Amount of information presented	5	4	3	2	1
Amount of new information	5	4	3	2	1
Overall satisfaction with presentation	5	4	3	2	1

Personal Information

Your Health

Excellent Good Fair Poor

Spouse Health

Excellent Good Fair Poor

Crisis Alert

Someone in my immediate family is in a near Nursing Home now or is likely to in the near future

Do you presently have a Will? Yes No

Do you presently have a Trust? Yes No

Comment: _____

What's important to you?

Rate 1 Low – 10 High

- Ensure I don't lose control or access to my assets
- Avoid becoming a burden to my loved ones
- Having a proper Health Care Directive and Power of Attorney
- Create my rule book instead of using the Government's
- Protect my stuff from Government, Long-Term Care Costs, Taxes, Lawsuits
- Avoid Probate
- Ensure I have a plan, not just documents
- Putting a professional team together to support my plan
- Protection my assets for my loved ones (from their predators)
- Other _____

It's Time to A.C.T. Free Estate Planning Consultation (\$300 Value)

A free consultation is offered to those attending this workshop. Please indicate how you would like to take advantage of this opportunity:

Yes, I would like a free consultation. Please contact me for a consultation.
When: _____

I'm not interested in a consultation, but I'd like to be on your mailing list.



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Name _____

Address _____

City _____ State _____ Zip _____

- Relative
- Friend
- Colleague

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