***Maximizing Social Security & Tax Advantaged Planning - Course Evaluation***

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructor: ­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. On the scale below, how would you rate the class overall?

1 2 3 4 5

Explain:

1. On the scale below, rate the quality of the material “Maximizing Social Security” (Part I) course booklet.

1 2 3 4 5

Explain:

1. On the scale below, rate the quality of the material “Tax Advantaged Planning” (Part II) course booklet.

1 2 3 4 5

Explain:

1. On the scale below, how effective was your instructor at explaining the concepts of the course?

1 2 3 4 5

Explain:

1. On the scale below, how would you rate the class discussions?

1 2 3 4 5

Explain:

1. Did the course fulfill your expectations?

Explain?

1. Would you recommend this course to a friend?

Explain:

***So, now what can you do?***

Your participation today entitles you to a no-obligation one-hour Social Security and Tax Advantaged Planning session with your instructor if scheduled within 30 days.

**❏ Yes, I want a no obligation planning session.**

**❏ If no, can you tell us why?**

|  |  |
| --- | --- |
| * I’m 100% confident in my current retirement plan. | * I have no money to plan with |
| * I have addressed all of my concerns and have no questions. | * Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |  |
| --- | --- | --- | --- |
| **Best Day to Meet** | | **Best Time** | **I need to meet:** |
| ❒ Monday  ❒ Tuesday  ❒ Wednesday | ❒ Thursday  ❒ Friday | ❒ 8am – 12pm  ❒ 12pm – 3pm  ❒ 3pm – 6pm | ❒ ASAP  ❒ Within 7-10  days |

**❏ Please sign me up for important email communications with the instructor.**

We try to accommodate everyone’s schedule. Someone from our office will reach out to you shortly to schedule your planning session.

We would like to thank you for your participation in the class and hope you enjoyed your time with us!

Additional Comments: