

# Workshop Blue Sheet

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone 1 \_\_\_\_\_  HOME  WORK  CELL Phone 2 \_\_\_\_\_  HOME  WORK  CELL

Email \_\_\_\_\_

<b>Overall Rating</b>	Excellent	Very Good	Fair	Not Great	Poor
<b>Value of Information</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>Clarity of Presentation</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>

**Additional Comments or Questions** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

<b>Areas of Potential Concern</b>	Major Concern	Minor Concern	Not Concerned	<p>Scan to Schedule Visit</p>  <p>Which other workshop topic would you most like to attend?</p> <p>_____</p>
Legacy Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Legacy Reflection Worksheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Caregiving Plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Estate Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Charitable Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
General Retirement Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
General Investment Strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tax Reduction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Please select the best day and time for your free consultation. We will contact you to schedule and confirm. (Or use QR code above to schedule)

	Mon	Tue	Wed	Thu	Fri
Morning	<input type="checkbox"/>				
Afternoon	<input type="checkbox"/>				
Evening	<input type="checkbox"/>				

**The 15-Minute "Mini-Consult"**

**Retirement Tax Analysis**

**Thank you!**