

# *After Seminar Follow Up*

     /      / 2008

Names \_\_\_\_\_

Address \_\_\_\_\_

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

Home Phone\* (\_\_\_\_) \_\_\_\_\_ Cell\* (\_\_\_\_) \_\_\_\_\_

Work Phone\* (\_\_\_\_) \_\_\_\_\_ Other (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_ @ \_\_\_\_\_

Married  Home Owner  Children (ages) \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

## **Yes! I/We Desire A Financial Game Plan**

Appointment Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Best time to call: \_\_\_\_\_ am / pm

### ***My Immediate Concerns Are:***

- Eliminate Debt*    *Proper Protection*    *Secure Retirement*
- Children's College*    *Legal Concerns*    *'Will' for my family*
- Budgeting (Rule of .231 applies)*    *More Income*    *DYNAMIC Career Change*
- Need to review investments*)    *Purchasing a home*    *Lower Taxes*
- More information on working 1 night/day a week, \$500+ month*

### ***Comments:***

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