



Workshop Date _____



Please take a moment to complete this questionnaire.

PRINT your name _____ Age _____
 Spouse (if appl.) _____ Age _____
 Address _____ City _____ State _____ Zip _____
 Best Contact Phone _____ Email _____

RETIREMENT ROADBLOCKS QUESTIONNAIRE

YES NO

- 1. Are you confident that your savings will withstand a **25 to 30+ year retirement**?
- 2. Do you have a plan to combat **inflation's damaging effects** on your purchasing power?
- 3. Do you have alternate income sources not tied to the market to offset **sequence of returns risk**?
- 4. Do you know what **withdrawal rate** is reasonable to help sustain your lifestyle in retirement?
- 5. Are you confident that your **Social Security benefits** are optimized for yourself and your spouse?
- 6. Do you have strategies to cover rising healthcare costs and potential **long-term care needs**?
- 7. Do you have a **tax allocation strategy** to help minimize the impact of taxes during retirement?

I WOULD LIKE A SECOND OPINION

If you answered "NO" to one or more questions above, you might want to review your strategy.

- YES!** I would like to schedule a complimentary financial review to explore financial strategies and insurance solutions to help protect and grow my retirement assets. I understand there is absolutely no obligation.
(Check your appointment preference.)

BEST DAY		BEST TIME
<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> 9:00 AM - 12:00 PM (Noon)
<input type="checkbox"/> Wednesday	<input type="checkbox"/> Thursday	<input type="checkbox"/> 12:00 PM (Noon) - 5:00 PM
<input type="checkbox"/> Friday		<input type="checkbox"/> 5:00 PM - 7:00 PM

List any specific questions/concerns you would like the presenter to address. _____

- I'd like a speaker to present Retirement Roadblocks for my group (civic organization, church, book club, company, etc.).
 Please contact me. Group type: _____
(We will call you for contact information preference.)

ENJOY THE SCENIC ROUTE ON YOUR RETIREMENT JOURNEY.

Please note that we do not give tax, legal, or Social Security advice. You are encouraged to consult your tax advisor, attorney, or the Social Security Administration regarding your particular situation.