

Contact Sheet

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Thank you for attending today's workshop.

I would greatly appreciate it if you could take a few minutes to complete this contact sheet. All information will be kept strictly confidential.

Please add your contact information below.

NAME

ADDRESS

CITY, STATE, ZIP CODE

EMAIL

PHONE

Steps that you would like to consider next

- ☐ Meet for a one-on-one complimentary consultation to address any concerns
- ☐ Have a followup discussion in _____ weeks or _____ months

Concerns that you would like me to address

- ☐ Saving more for retirement
- ☐ Saving more for other financial goals (please list goals)

- ☐ Reviewing current holdings and discussing possible alternatives
- ☐ Finding out more about funds that are designed to provide dividends
- ☐ Finding out if and how mutual funds may benefit you
- ☐ Other concerns (please list)



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If this workshop was helpful to you, it may also be beneficial to family members, friends and business associates. Please list below any people you think this workshop could benefit. We will be happy to contact your referrals.

NAME

NAME

ADDRESS

ADDRESS

CITY, STATE, ZIP CODE

CITY, STATE, ZIP CODE

EMAIL

EMAIL

PHONE

PHONE

Thank you for your assistance and for attending the workshop. I hope you found it informative.

By providing this information, you are giving express permission to contact you.

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