

# Three Quick Questions!

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1.) We are retirement & tax planning specialists. Our expertise is in helping people over the age of 50 who are in retirement or nearing retirement. (check all that apply)

← Sounds like me!

2.) Our Retirement Checkup provides the most value to people who have accumulated a retirement nest egg of at least \$750,000. EXCLUDING real estate, when you add up your investments + retirement accounts, you have approximately: (circle one)

\$750k - \$3M

\$3M - \$5M

\$5-\$10M

\$10M+

3.) What Are Your Primary Concerns? [Check all that apply] (check all that apply)

- Stock Market Volatility
- Reducing Taxes
- Coordinating Retirement Distributions
- Can I Retire?

That wasn't too painful, right? Anything else would you like to share with us? (Optional)

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