

# QUESTIONNAIRE

**What type of education would you like to learn about to help improve your family's quality of life?**

- ☐ Types of Life Insurance
- ☐ Investing in mutual funds (Roth IRA's, 401k, 403B, etc.)
- ☐ College Funds for your children
- ☐ Save money on auto and homeowner's insurance
- ☐ Legal Protection-Trust / Protection against ID Theft
- ☐ Purchase or refinance a home
- ☐ Budgeting
- ☐ Manage Business or Personal Finances
- ☐ Tax Preparation

Name \_\_\_\_\_

E-mail Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Check or circle all that apply

- ☐ Married
- ☐ Single
- ☐ Children ( please circle age group 0-17, 18-25, 25-39, 40+)
- ☐ No Children
- ☐ Homeowner

Would you like a free consultation? ☐

Questions/Comments: \_\_\_\_\_