

Hand in this evaluation form for your free copy of David Phillips' report:

# LEVERAGED

## CARE SOLUTIONS

ANSWERS TO TODAY'S LONG-TERM CARE CRISIS

# EVALUATION FORM

David Phillips, Todd Phillips, and Richard Durfee will be available for complimentary Estate Review Consultations on **Thursday 12:50pm – 2:15pm, 3:30pm – 4:15pm and Friday 9:00am – 9:45am, 10:30am – 4:00pm** at Booth 207.

FULL NAME		SPOUSES NAME	
DAY PHONE		EVENING PHONE	
EMAIL			BEST TIME TO CALL
ADDRESS	CITY	STATE	ZIP CODE

- Please schedule my Estate Review Consultation at MoneyShow 2017.
- Thursday  Friday
- After hearing the presentation I am extremely motivated to take action; however, I will not be able to schedule an Estate Review Consultation at this time. Please contact me as soon as possible to schedule an initial telephone Estate Review consultation.
1. What aspects of the workshop did you enjoy? Please check all that apply.
- Quality of the information  Professional expertise of presenter
- Concise presentation of material
2. Have you experienced a long-term care event with either a family member or friend? Yes  No
3. Would you like to discover how you can relieve your family from the financial burden of a long-term care event? Yes  No
4. If you triggered a long-term care event today, what asset would you use first to pay the enormous expense?
5. Are you interested in exploring an individual "use it or lose it" stand alone LTC policy? Yes  No
6. Do you now have a clearer understanding of the benefits of a Leveraged Long-Term Care Solution? Yes  No
7. Which Leveraged Care Solution would you personally like to explore? Please check all that apply.
- LTC/Annuity Combo  Life Legacy/ LTC combo  LTC/ Life Combo
8. Do you currently own any Annuities or Life insurance policies with gain?
- Yes, an annuity  Yes, a life policy
9. In addition to providing the financial means to take care of a Long-Term care event, do you want to provide a guaranteed financial legacy for your family? Yes  No
10. Would you like to receive a complimentary Leveraged Care Solution Analysis? Yes  No
11. Which group describes your household net worth ?
- \$1 mill - \$3 mill  \$3 mill - \$5 mill  \$5 mill - \$10 mill  \$10 mill-\$20mill  \$20 mill+
12. Please rate the presentation from 1 - 5 (5 being the highest)

**MONEYSHOW**<sup>3</sup>

INVEST SMARTER, TRADE WISER

© 2017 Estate Planning Specialists, LLC.

FEEL FREE TO MAKE ADDITIONAL COMMENTS ON THE REVERSE.

**Booth 207**



ESTATE PLANNING SPECIALISTS, LLC

—ESTATE PLANNING MADE EASY—