

Hand in this evaluation form for your voucher for a free copy of David Phillips' book: The 10 Most Common Estate Planning Mistakes and How to Avoid Them

# EVALUATION FORM

## The 5 Most Common Asset Protection Blunders

Richard Durfee, CEO - The Durfee Law Group PLLC

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 the 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. The Information presented was:  Extremely understandable

Somewhat understandable  Not clear at all

3. Do you now have an understanding of The 5 Best Planning Practices for Every Estate?

Yes  No

4. Do you now have an understanding of the new Estate Planning laws of Engagement?

Yes  No

5. Would you like to create your own Defensive Asset Protection Strategy? Yes  No

6. Are you interested in establishing Family Dynasty Trust? Yes  No

7. Are you interested in establishing an Integrated Dynasty Trust? Yes  No

8. Do you want to make certain you keep your wealth in the family and Disinherit the IRS?

Yes  No

9. Would you like to receive information concerning our proprietary Estate Planning Suite?

Yes  No

10. Which group describes your household net worth ?

\$1 mill - \$3 mill  \$3 mill - \$5 mill  \$5 mill - \$10 mill  \$10 mill-\$20mill  \$20 mill+

11. Please rate the presentation from 1 - 5 (5 being the highest)

FEEL FREE TO MAKE ADDITIONAL COMMENTS ON THE REVERSE.

**MONEYSHOW.COM**  
INVEST SMARTER, TRADE WISER

© 2017 Estate Planning Specialists, LLC.

Booth **207**

**DURFEE**  
LAW GROUP PLLC  
INTEGRATED PLANNING