

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

EVALUATION FORM

The 10 MOST COMMON ESTATE PLANNING MISTAKES and how to avoid them

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. Do you now have an understanding of how proper estate planning can save your assets from estate and income taxes and probate fees? Yes No

3. Would you like to receive information about our proprietary Estate Planning Solutions Suite? Yes No

4. Do you want to make certain you keep your wealth in the family and Disinherit the IRS? Yes No

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

6. Would you like to explore the power of leveraging your annual and lifetime gift tax exclusions through The Family Bank Strategy? Yes No

7. Would you like to discover ways to lower your income taxes and maximize the power of your IRA/401k? Yes No

8. Would you like to learn how to maximize the power of your IRA and eliminate out-of-pocket conversion tax? Yes No

9. Would you like to explore Leveraged Care Solutions, the answer to today's Long Term Care crisis? Yes No

10. Would you like to crash proof your investment portfolio? 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.COM

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FEEL FREE TO MAKE ADDITIONAL COMMENTS ON THE REVERSE.

Booth 207



ESTATE PLANNING SPECIALISTS, LLC

—ESTATE PLANNING MADE EASY—