

# Give Us Your Thoughts

Thank you for attending today's presentation. Please take a moment to complete this brief evaluation so we can continue to improve future programs.

**1 - Agree 2 - Neutral 3 - Disagree**

I learned helpful information from this presentation.       The presenter was knowledgeable and clear.       I would recommend this presentation to others.

**What part of the presentation did you find most interesting?**

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**If you could recommend one thing to improve this presentation, what would it be?**

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**How did you learn about this presentation?**

Invitation

Friend/relative

Other: \_\_\_\_\_

**What are your primary financial needs? (Check all that apply.)**

Preparing for retirement

Preparing for the unexpected

Assisted care

Living in retirement

Providing for survivors

Longevity risk

Paying for education

Emergency cash

Planning an estate or inheritance\*

Disability

\*Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. You should consult with your tax and legal professionals about your specific situation.

**What other common financial needs do you have? (Check all that apply.)**

Managing debt

Saving for a special purchase: \_\_\_\_\_

Paying off a mortgage

Other needs: \_\_\_\_\_

**Which steps are you interested in taking next? (Check all that apply.)**

Schedule an appointment to discuss my financial goals

Receive an invitation to future events, financial seminars and workshops

Receive a regular Edward Jones investment newsletter

Other: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Email address: \_\_\_\_\_

Seminar title: \_\_\_\_\_ Date: \_\_\_\_\_

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