

Sign-up Sheet: Financial Appointments



Advisor:	Date & Time:

Please sign-up if you are interested in meeting individually with our CERTIFIED FINANCIAL PLANNER™ to discuss your specific financial questions, concerns, or interests in any of the following topics:

- | | | |
|------------------------|--|--------------------|
| 1. Your current 401(k) | 4. Investment Strategies | 6. College Savings |
| 2. Account Rollovers | 5. Insurance (<i>life, disability, long-term care</i>) | 7. Other |
| 3. Retirement Planning | | |

**Remember to bring your statements if there are specific accounts you would like to have reviewed.*

Print Name	<i>(write topic #'s from above)</i> Topic	<i>(sign when you attend your meeting)</i> Signature
1.		
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NOTE: Meetings are planned for approximately 15-minute intervals. If more time is needed (or we could not get through all appointments), we will follow-up with you to finish the conversation, or schedule another meeting.

Securities and investment advisor services offered through Woodbury Financial Services, Inc. (WFS) member FINRA/SIPC. WFS is separately owned and other entities and/or marketing names, products, or services reference here are independent of WFS. Evan Ocepek is a licensed insurance agent and, in such capacity, may recommend and help with the purchase of various insurance products directly through the selected carrier. CA Life Insurance #0H34782.

Continued...

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