



Seminar topic: _____

Date: _____

Name: _____

E-mail: _____

Phone: _____

How was the location of the event? (i.e., did you like the hotel/restaurant/banquet hall where the seminar was held?)

Which sessions most interested you?

Were the topics covered relevant to your day-to-day responsibilities? If not, what would you like to see incorporated at future meetings?

What funds are you more likely to consider as a result of this meeting?

There are a variety of ways to access asset management expertise. What are you most interested in learning more about?

- Estate planning
- College savings
- Retirement planning
- Tax savings
- Other

On a scale of 1 to 3, what is most important to you?

- Performance
- Frequency of contact
- Fees that I charge for your financial planning

Which print publications, Web resources, or television programs do you follow regularly?

How would you like to be contacted?

- Performance
- Phone
- E-mail
- Mail
- Webinars
- Web Chat

Do you have any friends or relatives who would benefit from attending our next seminar?

Overall feedback:

We appreciate you taking the time to complete this questionnaire; your comments and suggestions will be helpful as we plan future meetings.