

## Course Goals

This course is designed to be an interactive course. Class participation is encouraged. Please take a moment to write down what you hope to get out of this course so that your instructor can focus on these topics.

Name(s): \_\_\_\_\_ Date: \_\_\_\_\_

1. I was hoping this workshop would help me/us?
2. What concerns you the most about your retirement assets?
3. What are your greatest concerns regarding your retirement goals?
4. Are you currently retired?  Yes or  No  
If not currently retired, do you plan on retiring?  Yes or  No  
If not currently retired, in how many years do you plan to retire? \_\_\_\_\_
5. What is /was your occupation?
6. How do you classify yourself as an investor?  Conservative  Moderate  Aggressive  
 In-between Conservative/Moderate  In-between Moderate/Aggressive
7. Rank the following on a scale of 1 to 4 in the importance to you and your retirement assets (1 being lowest & 4 being highest).  
\_\_\_ Liquidity    \_\_\_ Protection    \_\_\_ Safety    \_\_\_ Growth    \_\_\_ Income
8. What keeps you up at night, when it comes to your retirement?
9. Are you 100% sure you will have a good retirement?  Yes or  No