



Tax FREE Retirement

- 1) Do you feel you are paying too much in taxes? _____

- 2) Are you ok paying over 40% of your money to taxes? 33% fed + 6% sales tax + 3.5% gas tax + (depending on State) an additional 5-8% State tax _____

- 3) Where do you believe taxes are heading---up or down? _____

- 4) Do you have a 401k or retirement plan? Is it tax deferred? Are you ok paying higher taxes when you retire? _____

- 5) Would you like to know what options are available to minimize or avoid taxes? Are you a saver? Would you like a better return on your money? _____

Children

- 1) Do you have kids? _____

- 2) Is their college education important to you? _____

- 3) Have you looked into what college savings plans are available such as 529's? _____

- 4) Do you know anyone with young children? _____