

FINANCIAL LITERACY 101 SURVEY

EMPOWERMENT – Providing our clients' with the tools to succeed. **INSPIRATION** – Offering world class motivation and business training. EDUCATIONAL - Sponsoring exceptional workshops for our valued clients. **INNOVATION -** Researching strategies, partnerships & products to ensure our clients' financial success **OWNERSHIP** – Take control of your financial future!

TOGETHER, WE ARE THE BEST!!!

<u> </u>	Name:		
4	Address:		City:
-	Tel:	Cell:	
<u> </u>	Email:		

Have you thought about Financial Freedom?	□ Yes	□ No						
What is your ideal retirement age? □ 40 – 49	□ 50 – 59	□ 60-69						
Do you carry significant financial responsibilities?								
	tgage 🛛 🗆 De	ebts						
Which topics concern you, or would you most like to	Which topics concern you, or would you most like to learn about?							
Credit Card debt Loans or Mortgages	Home purchase	ase						
 Investments Job and career future 	Insurance							
Savings for College or Retirement								
Has Anyone Explained the 4 Debt Contracts to You?								
□ Yes □ No								
I want to attend a Workshop at the National Best Lea	arning Center!							
OR Choose the most convenient day for your Personalized Consultation:								
□Mon □ Tues □ Wed □ Thurs □ Fri □Sat	□Sun							
Do you feel your children should be taught financial	literacy?							
Financial Literacy is crucial to survival in a	today's econom	у.						
This is a type of literacy that is not tau	ght at school:							
how to be smart about your finances and se	ecure your lifest	yle.						
Your First Step towards Financial Success!!!								

A LICENSED ADVISOR FROM NATIONAL BEST FINANCIAL NETWORK WILL BE CONTACTING YOU IN THE NEAR FUTURE!

Have you thought about Financial Freedom?

What is your ideal retirement age? \Box 40 – 49



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Name:

Cell:

City:

Tel:

Email:

Do you carry	, significar	t financ	ial respo	onsibilit	ies?					
□ Ch	ildren	Aging	parents		Mortgage		Debts			
Which topics	s concern y	/ou, or v	vould yo	u most	like to le	earn abo	ut?			
	Credit Card d	ebt	Loans or Mortgages		ages	Home purchase				
	Investments		Job ar	nd career	areer future		surance			
	Savings for C	ollege or F	Retirement	t	□ Ot					
Has Anyone Explained the 4 Debt Contracts to You?										
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	Your F	irst Ste	ep towa	rds Fir	nancial	Succes	ss!!!			

Yes

□ 50 – 59

□ No

60-69

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