



The **Conquering the Dynamic World of Retirement** Workshop seeks to help people develop a strategy for maximizing their Social Security benefits in conjunction with protecting their retirement income. We would like you to take a few minutes and jot down your initial thoughts regarding your expectations of this workshop so your instructor can best mold the class to the needs of those present.

Name(s): _____

1. I hope this workshop helps me/us:

2. What are your immediate concerns about Social Security?

3. What are your greatest concerns regarding your retirement goals?

4. What is /was your occupation?

5. Are you currently retired? _____ Yes _____ No

If not retired, do you plan on retiring? _____ Yes _____ No

How many years before you plan to retire? ____

6. Are you currently receiving Social Security?

If no, at what age do you plan to start benefits? _____

7. Rank the following from 1 to 4 in order of importance to you and your retirement income (1 being most & 4 being least).

_____ Guarantees _____ Taxation _____ Inflation _____ Healthcare

Thank you for taking a moment to help us customize class.