

## Course Objectives

This course, "Safe Money Principles of Retirement Planning", is designed to be an interactive course. Please take a moment to evaluate your course objectives. Your instructor will review this form and focus on the listed objectives. Class participation is encouraged.

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

1. What are your main learning objectives you hope to achieve from this course?

2. What are your concerns 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 yes, in what year will you retire? \_\_\_\_\_

5. How do you classify yourself as an investor?

Conservative      Moderate      Aggressive

In-between Conservative/Moderate      In-between Moderate/Aggressive

6. In the importance to you and your retirement assets please rank the following on a scale of 1 to 4 (1 being lowest & 4 being highest).

\_\_\_Liquidity

\_\_\_ Protection

\_\_\_Growth

\_\_\_Income

7. Are you confident your retirement can last 30+ years? Yes or No