



## Coaching/Mentoring/Plan Design Gold Level

This level includes Silver and is for those who want a formal assessment of their current situation. A written assessment will be provided and reviewed with you by an approved advisor.

- Review of your estate planning documents (or need for them if not completed)
- Review of your retirement income needs
- Review of current financial plan
- Assess the risk of your investments
- Determine if you are paying too much in taxes
- Determine your vulnerabilities to negligence lawsuits
- Review life, annuity, and DI contracts

Name \_\_\_\_\_

Billing Address \_\_\_\_\_

Mailing Address if different \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

### Items of Most Importance (Please list by number of importance 1-7)

- \_\_\_\_\_ Estate Planning
- \_\_\_\_\_ Asset Protection
- \_\_\_\_\_ Reducing Taxes
- \_\_\_\_\_ Avoiding/Reducing Stock Market Risk
- \_\_\_\_\_ Retirement Planning
- \_\_\_\_\_ Long-Term Care Planning
- \_\_\_\_\_ Guaranteed Income for Life

Best time for a 1-hour call with Rocco DeFrancesco: \_\_\_\_\_ During work hours \_\_\_\_\_ After work hours

### Credit Card Payment (\$750 one-time payment)

Credit Card Number \_\_\_\_\_ Exp. Date: \_\_\_\_\_ 3 digit ID \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Return to your filled out signup form to:** [support@consortiumwealth.org](mailto:support@consortiumwealth.org).