



## Coaching/Mentoring/Plan Design Platinum Level

This level includes levels Silver and Gold and when your written assessment is delivered, it will come along with specific recommendations to fix any flaws with your current plan (or lack thereof).  
*A typical recommendation memo is 8-12 pages long.*

Specific steps to protect assets from creditors  
If needed, a "real" estate plan design  
Recommended tools to avoid large market downturns  
Recommendations on how to minimize taxes  
A completed financial plan including income for life planning.  
If needed, Rocco will join the call to go over your recommended plan!

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 (\$1,000 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).