

ATTENDEE OPINIONS OF THE 2005 MINI-INSTITUTE

A – (Very Favorable) **5** B- (Favorable) **4** C - (No Strong Feelings) **3** D - (Unfavorable) **2** E - (Very Unfavorable) **1**

Results, notes, and comments are indicated in BLUE.

RATING

1.	Overall program	<u>4.54</u>
2.	Meeting facilities	<u>4.73</u>
3.	Visibility and helpfulness of visuals	<u>4.64</u>
4.	Mr. Higgins' presentation	<u>4.05</u>
5.	Mr. Otar's presentation	<u>4.77</u>
6.	Workbook	<u>4.55</u>

Higgins visual too small.

7. Did you find the two-day program appropriate? **YES 21 / NO 0 ? 1**

8. If "NO" to #7 why not? ___

9. Would you recommend keeping the program for future meetings after April 15th? **YES 19 / NO 2 ? 1**

Move to Feb/March?

Available in March.

10. What subject matter would you like to see covered at future Mini-Institutes?

Long Term Care

How to generate more income for retirees.

Anything dealing with boomers.

Estate, Financial, Investment Managing, Variable Universal Life, Charitable

Retirement distribution options/decisions 72(t), RMD, Lump-sums, etc

More topics, less time per topic.

Agent estate planning-or representative.

11. **Suggested speakers for future Mini-Institutes.**

Maybe a brief presentation from a wholesaler to pick-up part of the cost!

12. Do you anticipate attending next year's Mini-Institute? **YES 21 / NO 0 ? 1**

13. Would you recommend this program to a fellow financial service professional? **YES 22 / NO 0**

14. Primary profession: **CFP CLU CLU/ChFC CPA LLB JD NONE**
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Other comments or suggestions:

Jim Otar hard to hear. Should have put a mike on him.

Lunch and Snacks were Excellent. Thanks for some healthy/lighter options.

File for CFP credits.

Jim's presentation was excellent. Great ideas-very informative.

Jim Otar's is one of the finest presentations I've heard at the Mini-Institute in recent times.

I enjoyed the investment segment.

Excellent program. Mr. Otar's presentation was probably the best I've seen here.

On the nametags, decrease size of FSP logo and increase the company and city name of the attendee.

Thanks to our officers for their efforts in staging another fine Mini-Institute.