

# Seminar Evaluation Summary

<b>Title</b>	<b>Unveiling the Retirement Myth</b>			<b>Code</b>	<b>T8341A</b>
<b>Facility</b>	<b>Sutton Place Hotel</b>	<b>City</b>	<b>Vancouver</b>	<b>Date</b>	<b>June 16, 2008</b>
<b>Leaders</b>	<b>1. Jim Otar</b>	<b>2.</b>	<b>3.</b>		

**Registrants: 34    Returns: 23    Response Rate: 67.7%**

## CONTENT EVALUATION

<b>DEPTH</b> – Is the seminar material of sufficient depth/breadth to impart new information to you?	Too Broad		Just Right		Not Enough	
	0.0%	0	95.2%	20	4.8%	1
<b>EXPECTATIONS</b> – Did the seminar, as advertised, meet your expectations?	Yes		Somewhat		No	
	87.0%	20	13.0%	3	0.0%	0
<b>USEFUL REFERENCE</b> – Will the material be a useful reference source for you?	Yes		Somewhat		No	
	82.6%	19	17.4%	4	0.0%	0
<b>VALUE</b> – Was this seminar of practical value to you?	Yes		Somewhat		No	
	95.7%	22	4.3%	1	0.0%	0
<b>RECOMMEND</b> – Would you recommend this seminar to others?	Strongly		Yes		No	
	60.9%	14	39.1%	9	0.0%	0

<b>OVERALL</b> – What is your overall impression of this seminar? Excellent=5, Above Ave=4, Satisfactory=3, Below Ave=2, Poor=1	Excellent	Above Ave	Satisfactory	Below Ave	Poor
	38.1%	47.6%	14.3%	0.0%	0.0%
	<b>Average Rating: 4.24</b>				

### What aspects of the seminar appealed to you the most?

- The presenter is very good; he made the course very fun.
- Very informative! Break down false assumptions. Make me a better overall advisor.
- He kept it simple.
- Practical information based on historical results.
- Appeared to be objective.
- Very practical, useful personally and professionally.
- Practical retirement planning.
- Tools for determining retirement needs.
- Useful examples, personal analysis portion, and review of products.
- Good sense of humor; tool should be useful.

### What areas of the seminar could be improved?

- More focus on the accumulation phase for retirement and investment mix that would work best. Identification of more pits falls to getting to retirement and during retirement.
- Consider more asset/investment strategies.
- Discussed various statistics relating to portfolio failure. It would help if more information on how the statistics were obtained.
- Most of examples missed some of more realistic everyday realities.
- Spend more time on asset allocation.
- Should reduce time on individual plans; it took too much time watching instructor fill in software template.
- Treat RRSP and nm-RRSP retirement assets separately.

### What new seminar topics would you like to see developed?

- None.

## ADMINISTRATIVE EVALUATION

	Satisfactory		Not Satisfactory		Not Applicable	
	Percentage	Count	Percentage	Count	Percentage	Count
Hotel/Training Facilities	95.2%	20	4.8%	1	0.0%	0
Facility Service (coffee/lunch if applicable)	100.0%	22	0.0%	0	0.0%	0
PD Staff Administration	95.2%	20	0.0%	0	4.8%	1
Comments: <ul style="list-style-type: none"> <li>The room was too cold.</li> <li>Coffee/tea after lunch would be great.</li> </ul>						

## LEADER EVALUATION

On a scale of 1 to 5, where **5=Excellent**, **4=Above Average**, **3=Satisfactory**, **2=Below Average**, **1=Poor**

Leader:	Jim Otar				Overall:	4.50	
Presentation style:	4.30	Knowledge of Subject Matter:	4.75	Ability to Handle Questions/Lead Discussions:	4.58	Use of Relevant Examples:	4.37
Would you attend other seminars led by this seminar leader:				Yes		No	
				100.0%	20	0.0%	0

## OVERALL EVALUATION

### Additional Comments

- Jim's tools are more realistic than the one I use in my office.
- Very interesting course and very informative.
- Very useful, practical course. Concepts can be applied immediately.
- First PD seminar that was worth the price.
- Possibly the best ICABC PD course I have ever attended.