

2004 Tampa Forum Speaker Evaluations

The member evaluations were separated from the new designees and others since it is the members who we will probably have as the majority of our attendees next year.

The overall rating uses the member evaluations on all the questions except “The content was relevant to my needs.” This was taken out of the speaker rating because some attendees weren’t that interested in a session but went because they were limited to what they could hear. Two evaluations had the comment: “I only came to this session because neither PD session at 2:15 was relevant.”

Ratings: 5.0 (high) to 1.0 (low)

CE 303 – Jim Otar “Retirement Planning: Mathematics of Lifelong Income for Your Clients”

Overall member rating: 4.45

Attendance: 80

Members’ evaluations: 50 evals., avg. membership: 16 years)

Others’ evaluations (3): 2 spouses, 1 guest

Content matched the course description:

Members 4.76

Other 4.66

Content was relevant to my needs:

Members 4.52

Other 4.33

I gained new knowledge from this session:

Members 4.66

Other 4.66

Support materials (visuals, handouts) enhanced the session:

Members 4.44

Other 4.66

Presenter’s style, mannerisms, and voice enhanced the presentation:

Members 3.94

Other 4.66

Comments:

- Excellent
- Some items covered too fast and commentary did not match slides in handout.
- Very good info
- Very mechanical (good news, bad news?), very knowledgeable, anxious to see software and use in practice (very detailed...may take some practice)
- At first, it seemed that I would learn nothing during the 2 hours. Later, his charts clarified the thoroughness of his research, and I feel it was very worthwhile.
- The best – bring him back!
- Good presentation. Pointed out the flaws of most retirement calculators.

- Good seminar.
- Handout was in different order because slides were added after original handout was submitted to SFSP. Caused a little confusion. Accent was a little difficult to understand at times.
- Outstanding!!! Caused us to rethink some of our assumptions – agree or disagree with his methodology but at least he made everyone THINK and he challenged all to grow! We need more programs like this!
- Best one of the 4 I saw – wish I could have 2 extra hours to ask questions and get more detail.
- Awesome! We need more workshops like this next year.
- The best presentation I've heard in a long, long time. You should put him on an audio conference or DVD.
- Brilliant man, interesting solutions to common retirement problems. A bit hard to understand speech-wise. Good overall presentation, however, the approach used is more academic than “real” world. Nonetheless, it was interesting and unusual – worth hearing!