

Seminar Evaluation Summary



Title	Unveiling the Retirement Myth			Code	A9314A
Facility	Four Seasons	City	Vancouver	Date	June 15, 2009
Leaders	1. Jim Otar	2.	3.		

Registrants: 35 Returns: 23 Response Rate: 66%

CONTENT EVALUATION

DEPTH – Is the seminar material of sufficient depth/breadth to impart new information to you?	Too Broad		Just Right		Not Enough	
	0.0%	0	100.0%	23	0.0%	0
EXPECTATIONS – Did the seminar, as advertised, meet your expectations?	Yes		Somewhat		No	
	91.3%	21	8.7%	2	0.0%	0
USEFUL REFERENCE – Will the material be a useful reference source for you?	Yes		Somewhat		No	
	91.3%	21	8.7%	2	0.0%	0
VALUE – Was this seminar of practical value to you?	Yes		Somewhat		No	
	95.7%	22	4.3%	1	0.0%	0
RECOMMEND – Would you recommend this seminar to others?	Strongly		Yes		No	
	73.9%	17	26.1%	6	0.0%	0

OVERALL – 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
	54.5%	45.5%	0.0%	0.0%	0.0%
	Average Rating: 4.55				

What aspects of the seminar appealed to you the most?

- Case studies to illustrate software and personal examples.
- Content and lecturer.
- Practical advice on real word environment.
- Very useful for clients and myself.
- Excellent supplementary of software provided.
- Excellent material and software.
- An intermediate evaluation of requirement planning assumptions.
- Wake up call history repeats itself important to know the market trends- inflation trends personal plan is important.
- Very good eye opener on how to change focus on retirement approach as when we retire.
- Determine how much saving a person needs.
- Very practical.
- Love his straight- forward approach. He provided a unique different perspective. This course is a must for anyone dealing with retirement.
- Real life examples and technical level excellent.
- All information on retirement vehicles and retirement planning.
- Well laid out/ informed presentation.
- Very practical.
- Practical information- much needed.

What areas of the seminar could be improved?

- Put more charts from software for case studies- screen too hard to read.
- Charts in binder too small to see details.
- Information not provided by seeking financial advisor.
- Pretty strong throughout- no suggestions.
- More written content to explain in steps.

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What new seminar topics would you like to see developed?

- Opening a CA practice risks / operations for CA firm.
- Investing money, stock market etc.
- Impact of variables saving streams over employment life.

ADMINISTRATIVE EVALUATION

	Satisfactory		Not Satisfactory		Not Applicable	
	100.0%	22	0.0%	0	0.0%	0
Hotel/Training Facilities	100.0%	22	0.0%	0	0.0%	0
Facility Service (coffee/lunch if applicable)	100.0%	22	0.0%	0	0.0%	0
PD Staff Administration	100.0%	22	0.0%	0	0.0%	0
Comments: Beef stroganoff and desserts were excellent.						

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:	4.52	
Presentation style:	4.30	Knowledge of Subject Matter:	4.70	Ability to Handle Questions/Lead Discussions:	4.48	Use of Relevant Examples:	4.61
Would you attend other seminars led by this seminar leader:				Yes		No	
				100.0%	23	0.0%	0

OVERALL EVALUATION

Additional Comments

- Resource materials/ program- excellent.
- Very timely.
- Good instructor and sense of humour.
- Should be required course for anyone whose clients are planning to retire.
- Very good course.