

## BUSINESS INSTITUTE

### Financial Planning Workshop

Thursday, April 4, 2013

### Evaluation Summary

14 Attendees

9 Evaluation Forms Completed

Types of Businesses Represented

- **Consultant**
- **Entrepreneur**
- **Financial Services (4)**
- **Merchandise Marketing/Graphic Design**
- **Micro Business Institute**
- **Transportation/Trucking**

How would you rate the overall presentation?

(Circle 1 the lowest to 5 the highest)                      **4 - 44%**                      **5 - 56%**

1. How would you rate the facilitator and panelists?

(Circle 1 the lowest to 5 the highest)

Elise Yanders	<b>4 - 33%</b>	<b>5 - 66%</b>	
Constance Thornhill Bettis	<b>3 - 45%</b>	<b>4 - 10%</b>	<b>5 - 45%</b>
Dan Dingus	<b>4 - 44%</b>	<b>5 - 56%</b>	
Abraham Moosa	<b>4 - 33%</b>	<b>5 - 66%</b>	

2. Do you have a better understanding of financial planning?    **Yes - 100%**

3. Which part of the financial planning workshop was of the most interest to you?

- **Trends of equity and debt markets**
- **Discussion and Abraham's presentation**
- **Market outlook**
- **Retirement planning**
- **The value of money and time**
- **The total overview of the climate was such that you felt comfortable asking questions**
- **General commentary of each participant**
- **Investment recommendations**
- **Recommendations in the low interest rate environment**

4. What other type(s) of workshops are you interested in attending?

- **All**
- **Investment strategy**
- **Financial is key for me, and growth**
- **Estate planning**
- **Business succession planning**

5. Did today's session meet your expectations?

- **Yes, getting my taxes in order**
- **Exceeded, good panelists.**
- **Yes, more work and education needed**
- **Yes**
- **Yes, I have a much clearer understanding**
- **Yes, good general overview**
- **Yes, the presentations were in English and there was enough time allotted for Q&A's**
- **No, found out at the last minute, no expectations**
- **Good topics but needed more people who could use and connect with advisors. Almost preaching to choir.**