

I would like to speak with a Zuk Advisor

Name: _____

Address: _____ Date: _____

Job Title: _____

Day Phone: _____ Evening Phone: _____

Email: _____ Best time to call: _____

Best day/time for appointment: _____

Please check all that apply:

- I would like a Retirement Income Projection
- I would like help in determining if a 403(b) or 457 plan is right for me
- I would like to enroll in the District's 403(b) or 457 plan
- I would like an assessment of my current investments (risk or volatility profile, allocation strategy, historical performance)
- I would like to discuss maximizing by CalSTRS/CalPERS pension benefits
- I would like to explore income tax reduction strategies

To schedule an appointment please call, or email this form to either of the following:

Nicole Kikugawa
(209) 532-9900
nkikugawa@zukfinancial.com

Joshua Schefers
(925) 830-5025
jschefers@zukfinancial.com

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