

Mt. Diablo Unified School District

Name: _____

Address: _____ Date: _____

Job Title/Site: _____

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 457 or 403(b) plan
- I would like an assessment of my current investments (risk or volatility profile, allocation strategy, historical performance)
- I would like to discuss maximizing my CalSTRS/CalPERS pension benefits
- I would like to explore income tax reduction strategies

To schedule an appointment please call, email or fax this form to:



The Educated Choice

Christa Varda, P: 510-547-7198. Email: cvarda@zukfinancial.com

Jim Adgar, P: 510-694-7648, Email: jadgar@zukfinancial.com

David Phillip, P: 925-280-2878, Email: dphillips@zukfinancial.com