



CTA: <https://pacoasisinvestments.com/application>

 Home

Are Looking For A Better Retirement Strategy With Tax Benefits?

Discover How This Strategy Will Help You Pay The Tax For Your Roth Conversion

Fill Out The Short Form Below To See If We Can Help

What Is Your Ultimate Goal In Retirement? Choose Up To Two Options: *

NEXT →



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SURVEY QUESTIONS:

#1 What Is Your Ultimate Goal In Retirement? Choose Up To Two Options?

#2 What Is The Approximate Amount Of Retirement Funds You Are Looking To Convert?

#3. Please explain your current tax strategy to save for retirement (please be as detailed as possible)?

#4. NAME, EMAIL, PHONE

Upon Submit Send To Scheduling Page

Step 2: Schedule Your Consultation Below

Tax Conversion Consultation

🕒 45 Mins

📅 Fri, Nov 7, 2025

Hello,

Please be in a quiet space so we can discuss if this is fit for your goals.

Sincerely, Pac Oasis Investment Team

Select Date & Time

< November 2025 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Time zone

🌐 GMT-05:00 America/New_York (EST)

11:30 AM

12:15 PM

01:00 PM

01:45 PM

02:30 PM

03:15 PM

04:00 PM

04:45 PM

Did the lead schedule an appointment?

Yes

No

Path 1 • Scheduled Appointment

Path 2 • Not Scheduled (Nurture Sequence)

CTA: Scheduling Link

Wait 5 min

Immediate SMS: Thank you for scheduling your tax conversion strategy appointment at {{appointment.start_time}}. Zoom link: {{appointment.meeting_location}}. Watch video: pacoasisinvestments.com/scheduled-thank-you

SMS 1: Follow up with scheduling link.





