



<https://pacoasisinve...>  
Roth Conversion - Dreading Taxes? [Learn more](#)

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

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:  
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

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

Wait 5 min

SMS 1: Follow up with scheduling link.





