

Retirement Income Planning Questionnaire

Each spouse / partner must complete a separate questionnaire

For best results, please answer each item. Answer 0 or NA or none as appropriate

Please answer only for yourself ... except ...

Please indicate joint property or joint guaranteed lifetime income

Your name _____

Your spouse / partner's name _____

Civil Status _____

(e.g. Married; Civil Union; Divorced; Widowed; Separated; Other)

Cell phone _____

Personal email _____

State of legal residence _____

Biggest Concerns

1. _____

2. _____

Work status _____

Retired; Full-time employee; Independent contractor; part-time; etc.

Earned Income _____

(from work only ... other income should be indicated elsewhere)

Retirement status _____

Date retired; Future retirement date projected, etc.

Social Security \$ _____ Date started or projected _____

Spousal Social Security: \$ or % _____ Date started or projected _____

Pension \$ _____ COLA _____ Date started or projected _____

Spousal pension benefit: \$ or % _____ Date started or projected _____

Qualified retirement plan (e.g. 401-k) Description _____

Current Balance \$ _____ Contribution \$ _____

Frequency e.g. monthly / pay period / etc. _____

Real Estate: Primary Residence: Ownership _____

(Individual, JTWR0S, Other)

Estimated current market value \$ _____

Mortgage balance owed \$ _____ Monthly Payment _____

Interest rate % _____ Pay Off Date _____

IRA #1: Balance \$ _____ Location _____

e.g. Bank, Brokerage, Annuities etc.

IRA #2: Balance \$ _____ Location _____

e.g. Bank, Brokerage, Annuities, etc.

Investment account #1: (non-IRA) Balance \$ _____ Location _____

e.g. Bank, Brokerage, Annuities, etc.

Investment account #2: (non-IRA) Balance \$ _____ Location _____

e.g. Bank, Brokerage, Annuities, etc.

Real Estate #2: Description / Location _____

Ownership _____ (Individual, JTWR0S, Other)

Estimated current value \$ _____ Mortgage balance owed \$ _____

Monthly Payment \$ _____ Interest rate % _____ Pay Off Date _____

Rental income \$ _____

Cash in Banks / CDs / Money Markets: Balances (total)\$ _____

Life Insurance

Is there any Life Insurance on your life? _____ Face Amount: \$ _____

Beneficiary _____ Owner _____

Cash Value \$ _____ Premium Payment \$ _____

Date premium payments end _____

Are you the beneficiary of any Life Insurance? _____: Face Amount: \$ _____

Owner: _____ Cash Value \$ _____

Premium Payment \$ _____ Date premium payments end _____

Potential future Inheritance \$ _____

Are you the beneficiary of any Trusts? _____ Lump Sum \$ _____

Income \$ _____ Duration _____

Trustee: _____

Do you / will you receive any other income streams \$ _____ Ending date _____

Description: _____ (e.g. structured settlement, lottery, etc.)