Retirement
Zoomer®

Employed

ENVESTNET
MoneyGuide

Personal Information

	Client (C)	Co-Client (Co)
Name		
Gender	☐ Male ☐ Female	☐ Male ☐ Female
Date of Birth	/ /	/ /
Email Address		
Employment Status	☐ Employed ☐ Retired ☐ Business Owner ☐ Homemaker	☐ Employed ☐ Retired ☐ Business Owner ☐ Homemaker
Employment Income	$	$
Other Income (non-investment only)	$	$
Marital Status		State of Residence	

Important Relationships

Children, grandchildren or any participant included in this plan.

Name	Date of Birth	Relationship
	/ /	
	/ /	
	/ /	

Retirement Age

At what age would you like to retire?	Client (e.g., age 65)	Co-Client (e.g., age 65, together)	**Your living expense** will be estimated (approximately 60%-70% of total employment income) and two goals will be created: Basic Living Expense (Need) and Extra Living Expense (Want).

Social Security Benefits - If available, provide your Social Security estimate from ssa.gov.

	Client		Co-Client	
Are you eligible?	☐ Yes ☐ No	☐ Receiving Now: $ ________________	☐ Yes ☐ No	☐ Receiving Now: $ ________________
Benefit amount	☐ Primary Insurance Amount (PIA) $ ________________		☐ Primary Insurance Amount (PIA) $ ________________	
When to start	At Full Retirement Age (per Social Security) ☐ at age ________ ☐ at retirement		At Full Retirement Age (per Social Security) ☐ at age ________ ☐ at retirement	

Retirement Income

(Pension, part-time work, rental property, annuities, royalties, alimony)

Description	Owner		Monthly Income	Start Year	Year It Ends or No. of Years	% Survivor Benefit	Check if amount inflates	GPO
	C	Co						
e.g., ABC Pension	☐	☐	$ 1,500		End of Life	50%	☐	☐
	☐	☐	$				☐	☐
	☐	☐	$				☐	☐
	☐	☐	$				☐	☐

Investment Assets

	Client		Co-Client	
Investment Type	**Current Value**	**Annual Additions**	**Current Value**	**Annual Additions**
Retirement Plans (e.g., 401k, 403b)	$	$ or %	$	$ or %
• **Employer Match**	$	$ or %	$	$ or %
Traditional IRA	$	$	$	$
Roth IRA	$	$	$	$
529 Savings Plan	$	$	$	$
Annuities	$	$	$	$
HSA	$	$	$	$
Taxable / Brokerage	$	$	$	$
Other:	$	$	$	$

Risk Score

How much market risk are you willing to accept? On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what's your risk score? If you're not sure, go ahead and guess. You can always talk with your advisor and revise if needed.

Client	Co-Client

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