

Retirement Zoomer®

Employed



Personal Information

	Client (C)	Co-Client (Co)
Name		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Date of Birth	/ /	/ /
Email Address		
Employment Status	<input type="checkbox"/> Employed <input type="checkbox"/> Retired <input type="checkbox"/> Business Owner <input type="checkbox"/> Homemaker	<input type="checkbox"/> Employed <input type="checkbox"/> Retired <input type="checkbox"/> Business Owner <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Receiving Now: \$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Receiving Now: \$ _____
Benefit amount	<input type="checkbox"/> Primary Insurance Amount (PIA) \$ _____	<input type="checkbox"/> Primary Insurance Amount (PIA) \$ _____
When to start	At Full Retirement Age (per Social Security) <input type="checkbox"/> at age _____ <input type="checkbox"/> at retirement	At Full Retirement Age (per Social Security) <input type="checkbox"/> at age _____ <input type="checkbox"/> 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	<input type="checkbox"/>	<input type="checkbox"/>	\$ 1,500		End of Life	50%	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	\$				<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	\$				<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	\$				<input type="checkbox"/>	<input type="checkbox"/>

Investment Assets

Investment Type	Client		Co-Client	
	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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