# Retirement Zoomer®

Retired

ENVESTNET
MoneyGuide

## Personal Information

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

## Important Relationships

Children, grandchildren or any participant included in this plan.

| Name | Date of Birth | Relationship |
|---|---|---|
| | / / | |
| | / / | |
| | / / | |
| | | |
| | | |

## Living Expenses

| Enter two amounts: | Current Amount |
|---|---|
| Need: day-to-day living expenses (e.g., food, clothes, utilities, etc.) | ☐ Monthly ☐ Annually<br>$ |
| Want: discretionary expenses (e.g., travel, gifts, etc.) | ☐ Monthly ☐ Annually<br>$ |

## 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 |
|---|---|
| | |

# Disclosure

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