

Retirement Zoomer[®]

Retired



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 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.)	<input type="checkbox"/> Monthly <input type="checkbox"/> Annually \$
Want: discretionary expenses (e.g., travel, gifts, etc.)	<input type="checkbox"/> Monthly <input type="checkbox"/> Annually \$

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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