RETIREMENT PLANNING QUESTIONNAIRE

Please identify your retirement targets in the spaces below.

RETIREMENT SCENARIOS

SPENDING

	LESS	BASE FACTS	MORE
☐ Annual Retirement Spending	$	$	$

SAVINGS

	LESS	BASE FACTS	MORE
☐ Annual Retirement Account Saving	$	$	$
☐ Annual Non-Retirement Savings	$	$	$

MARKET ASSUMPTIONS

	CONSERVATIVE	BASE FACTS	AGGRESSIVE
☐ Pre-Retirement Portfolio Return	%	%	%
☐ Post-Retirement Portfolio Return	%	%	%

LEGACY GOALS

	CONSERVATIVE	BASE FACTS	AGGRESSIVE
☐ Family Inheritance	$	$	$
☐ College Funding	$	$	$
☐ Charitable Giving	$	$	$

RETIREMENT TIMING

	EARLY		BASE FACT		LATER	
	Person 1	Person 2	Person 1	Person 2	Person 1	Person 2
Retirement Age						
Social Security	year	year	year	year	year	year
Life Expectancy	year	year	year	year	year	year

WHAT IFS

	WORST CASE		BASE FACTS		BEST CASE	
	Person 1	Person 2	Person 1	Person 2	Person 1	Person 2
☐ Long-Term Care						
Annual Amount	$	$	$	$	$	$
Number of Years						
☐ Elderly Loved One Care						
Annual Amount	$	$	$	$	$	$
Number of Years						
☐ Returning Child						
Annual Amount	$	$	$	$	$	$
Number of Years						

RETIREMENT PURCHASE GOALS

Type	Amount	Financing?	Net Cash Flow	Annual Amount	Start Year	Stop Year
	$	☐ Yes ☐ No	☐ Income ☐ Expense	$		
	$	☐ Yes ☐ No	☐ Income ☐ Expense	$		
	$	☐ Yes ☐ No	☐ Income ☐ Expense	$		
	$	☐ Yes ☐ No	☐ Income ☐ Expense	$		

FINAL EXPENSES

Person 1	$
Person 2	$

Do you have disability insurance?   ☐ Yes   ☐ No

Do you want us to model disability?   ☐ Yes   ☐ No

Do you have Social Security?   ☐ Yes   ☐ No

If yes, please upload to the vault

Do you have a pension?   ☐ Yes   ☐ No

If yes, please upload to the vault

ADDITIONAL CONSIDERATIONS