

RETIREMENT PLANNING QUESTIONNAIRE

Please identify your retirement targets in the spaces below.

ARIOS										
				LESS			BASE FACTS		MORE	
☐ Annual Retirement Spending				\$			\$		\$	
☐ Annual Retirement Account Saving				\$			\$		\$	
ement Savings			9	\$			\$		\$	
TIONS										
				CONSERVATIVE			BASE FACTS		AGGRESSIVE	
☐ Pre-Retirement Portfolio Return				%			%		%	
Portfolio Return					%			%	%	
				CONSERVATIVE			BASE FACTS		AGGRESSIVE	
е			9	\$		\$		\$		
			9	\$		\$		\$		
			9	\$		\$		\$		
ING										
EARLY				BASE FACT					LATER	
Person 1	Person 2		2	Person 1			Person 2	Persor	n 1	Person 2
ye	ear		year		year	year			year	year
ye	ear		year		year		year		year	year
		WORST CASE		E	BA		SE FACTS		BES	T CASE
☐ Long-Term Care		Person 1 Pe		erson 2	Person 1				erson 1	Person 2
		\$			\$		\$	\$		\$
☐ Elderly Loved One Care										
		\$			\$		\$	\$		\$
Number of Years										
☐ Returning Child					d d		¢	¢		\$
		Ψ			Ψ		T P	φ		Ψ
	rement Savings PTIONS Ortfolio Return Portfolio Return Person 1 Person 1 Annual Amount Number of Years e Care Annual Amount Number of Years	nt Spending Int Account Saving Fement Savings PTIONS Ortfolio Return Portfolio Return Person 1 Year Year Year Annual Amount \$ Number of Years E Annual Amount \$ Number of Years Annual Amount \$ Number of Years	nt Account Saving rement Savings PTIONS Ortfolio Return Portfolio Return e ING EARLY Person 1 Person year year year Year Annual Amount \$ Number of Years Number of Years Annual Amount \$ Number of Years Annual Amount \$ Number of Years	nt Account Saving Serement Savings Serement Savings Serions Se	Int Spending \$ Int Account Saving \$ Int Account Sav	LESS Int Spending Int Account Saving Interment Savings Interment Sa	LESS Int Spending Int Account Saving Int Account Saving Intermet Savings INTIONS CONSERVATIVE INTIONS CONSERVATIVE INTIONS CONSERVATIVE INTIONS CONSERVATIVE INTIONS CONSERVATIVE INTIONS INTIONS CONSERVATIVE INTIONS INT	LESS BASE F Int Spending \$ \$ Int Account Saving \$ \$ Interpretation of Saving \$ Interpretation of Saving \$ Interpretation of Saving \$ \$ Interpretation	LESS BASE FACTS	LESS BASE FACTS

Type Amount Financing? Net Cash Flow Annual Amount Start Year Stop Year S	RETIREMENT PURC	CHASE GOALS										
\$ Yes No Income Expense \$ \$ Yes No Income Expense \$ Yes No Yes Yes No Yes Yes No Yes Yes	Туре	Amount	Financing?	Net Cash Flow	Annual Amount	Start Year	Stop Year					
\$ Yes No Income Expense \$		\$	☐ Yes ☐ No	☐ Income ☐ Expense	\$							
FINAL EXPENSES Person 1		\$	☐ Yes ☐ No	☐ Income ☐ Expense	\$							
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		\$	☐ Yes ☐ No	☐ Income ☐ Expense	\$							
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		\$	☐ Yes ☐ No	☐ Income ☐ Expense	\$							
Do you have disability insurance?	FINAL EXPENSES											
Do you have disability insurance?	Person 1		\$									
Do you want us to model disability?	Person 2		\$									
If yes, please upload to the vault	Do you want us to	model disability? [□ Yes □ No									
		If yes, please										
	ADDITIONAL GONOI	DEIGHIONO										