

The Retirement Income Questionnaire

CLIENT INFORMATION

	Name	Gender	Date of Birth	State of Residence	Use of Tobacco Products	Projected Retirement Age
Client						
Spouse						
Dependent						
Dependent						

GENERAL ASSUMPTIONS

Post Retirement Tax Rate		Inflation Assumption	
Current Tax Rate		Social Security Cost of Living Adjustment	

RETIREMENT INCOME GOALS

	Estimated Amount
What is your current retirement savings from all sources?	\$
How much annual savings do you plan to put away until you retire? (401(k), IRA, Roth ect.)	\$
What gross dollar amount do you plan to spend per year in retirement? (Sum of a+b+c below)	\$ Net
a. What amount will fund your needs (e.g. utilities, taxes, food, shelter, healthcare, debt payments)	\$
b. What amount will fund your wants (e.g. new car every 5 years, entertainment)	\$
c. What amount will fund your luxury items (e.g. country club memberships, vacations)	\$

RETIREMENT RESOURCES

INCOME SOURCES

Type	Income (Yearly)	Owner	Age Income Begins	Inflation Adjustment
Social Security (Primary)				
Social Security (Spouse)				
Pension				
Other (rental property, oil/gas royalties, part time work, etc.)				
Other (rental property, oil/gas royalties, part time work, etc.)				

INVESTIBLE ASSETS

Account Name	Owner	Value	Approx: Equity % / Fixed %	Qualified / Non-Qualified

RISK MANAGEMENT

Type	Premium	Cash Value	Benefits
Life Insurance			
Long Term Care			
Other (Hybrid LTC, DI, ect.)			

