



Retirement Zoomer™

Personal Information

		Client (C)			Co-Client (Co)			
Name								
Date of Birth	/	/	Gender	<input type="checkbox"/> M <input type="checkbox"/> F	/	/	Gender	<input type="checkbox"/> M <input type="checkbox"/> F
Employment Income	\$			\$				
Marital Status				State of Residence				
Children and Grandchildren (or any other participant included in this plan)								
Name			Date of Birth	/	/	Age:	Relationship	

Retirement Age and Living Expense

At what age would you like to retire?	Client (e.g., age 65)	Co-Client (e.g., age 65, together)	Your living expense will be estimated (approximately 60%-70% of total employment income) and two goals will be created: Basic Living Expense (Need) and Extra Living Expense (Want).

Social Security Benefits

		Client		Co-Client	
Are you eligible?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Receiving Now			<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Receiving Now	
Amount of benefit	\$	<input type="checkbox"/> Use Program Estimate		\$	<input type="checkbox"/> Use Program Estimate
When to start	<input type="checkbox"/> at Full Retirement Age (per Social Security) <input type="checkbox"/> at retirement <input type="checkbox"/> at age _____		<input type="checkbox"/> at Full Retirement Age (per Social Security) <input type="checkbox"/> at retirement <input type="checkbox"/> at age _____		

Retirement Income (pension, part-time work, rental property, annuities, royalties, alimony)

Description	Owner		Monthly Amount	Starts	Ends	Inflates?	% Survivor (Pension Only)
	C	Co					
	<input type="checkbox"/>	<input type="checkbox"/>	\$			<input type="checkbox"/>	%
	<input type="checkbox"/>	<input type="checkbox"/>	\$			<input type="checkbox"/>	%

Investment Assets

Estimate of overall allocation: Cash _____% Bond _____% Stock _____%

Description	Client		Co-Client		
	Value	Annual Additions	Value	Annual Additions	
Total Employer Retirement Plan	\$	\$	\$	\$	
Assets: 401(k), 403(b) or Other. Your Contribution: _____% Company Match: _____% of first _____%					
Total Traditional IRA	\$	\$	\$	\$	
Total Roth IRA	\$	\$	\$	\$	
Total Tax-Deferred	\$	\$	\$	\$	
Joint Assets	Value	Annual Additions	Joint Assets	Value	Annual Additions
Total Taxable	\$	\$	Total Tax-Free	\$	\$

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?

Household	Client	Co-Client

Two thirds of all investors score between 40 and 60, and only 1 in 1000 select a score lower than 20 or greater than 80. Does your score feel right as you compare yourself to others?

	Household			Men			Women		
Age Group	> 64	50-64	< 50	> 64	50-64	< 50	> 64	50-64	< 50
Avg Score	47	50	54	50	54	59	45	48	52

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