



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
Marital Status				State of Residence		

Retirement Living Expenses

Enter two amounts:	After-Tax Amount
Need: day-to-day living expenses (e.g., food, clothes, utilities, etc.)	\$
Want: discretionary expenses (e.g., travel, gifts, etc.)	\$

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/Age	\$ <input type="checkbox"/> Use Program Estimate			\$ <input type="checkbox"/> Use Program Estimate		

\$ 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"/>	%
	<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

RCM
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