



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 | | |

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 |

