

## RETIREMENT PLANNING QUESTIONNAIRE

*The primary purpose of our investing is to enable us to maintain our standard of living throughout our retirement years.*

This questionnaire will help you to determine whether or not those investment strategies currently in place will enable you, and where appropriate, the surviving spouse, to maintain your current lifestyle(s) throughout your retirement years. The two-thirds offset rule affecting social security income will, where appropriate, be factored into the analysis.

Name: \_\_\_\_\_ Birth date: \_\_\_\_\_  
Retirement date: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

City: \_\_\_\_\_ Zip code: \_\_\_\_\_ State: \_\_\_\_\_

Current employer/school: \_\_\_\_\_

Spouse: \_\_\_\_\_ Birth date: \_\_\_\_\_  
Retirement date: \_\_\_\_\_

Current employer/school: \_\_\_\_\_

**To receive a comprehensive retirement analysis, complete the following and return by mail or email. Or you can call us and one of our staff will complete this form for you. (312-566-5400) It would be helpful to read through all of the items before you begin answering any of them.**

\_\_\_\_\_ Number of unused sick days (for educators only)

1. \$ \_\_\_\_\_ Monthly income required to maintain your lifestyle. Include mortgage, taxes & insurance on your home.
2. \$ \_\_\_\_\_ Monthly mortgage payments.  
Approximate number of years remaining on your mortgage? \_\_\_\_\_
3. \$ \_\_\_\_\_ Your monthly pension. School/Company: \_\_\_\_\_
- 3a. \$ \_\_\_\_\_ Spouse's monthly pension. School/Company: \_\_\_\_\_
4. \$ \_\_\_\_\_ Monthly Social Security income. Beginning date: \_\_\_\_\_
- 4a. \$ \_\_\_\_\_ Spouse's S.S. income. Beginning date: \_\_\_\_\_
5. \$ \_\_\_\_\_ Monthly income from your salary. (If you remain employed after retirement)
- 5a. \$ \_\_\_\_\_ Spouse's monthly income from salaries. (If employed after retirement)
6. \$ \_\_\_\_\_ Monthly income from rents, annuities, etc.
7. \$ \_\_\_\_\_ Total income. Add 3 -6 above.
8. \$ \_\_\_\_\_ Additional income, if any, required from investments. (1-7)
9. \$ \_\_\_\_\_ Value of your qualified plans: 401(k)s, 403(b)s, savings plans, etc.
10. \$ \_\_\_\_\_ Value of spouses qualified plans (401(k)s, 403(b)s, savings plans, etc.
11. \$ \_\_\_\_\_ Value of your IRAs
12. \$ \_\_\_\_\_ Value of spouses IRAs
13. \$ \_\_\_\_\_ Value of all investments not held in qualified retirement plans or IRAs.  
(Do not include the value of your home.)
14. \$ \_\_\_\_\_ Total assets from 9, 10, 11, 12, and 13 above.

Mail completed form to this address:  
The World Trade Council  
1006 S. Michigan Ave.  
Chicago, IL 60605

Or send by email to:  
marc@theworldtradecouncil.org

Or call:  
312-566-5400