

MONEYGUIDEPRO RETIREMENT & EDUCATION QUESTIONNAIRE

Personal and Confidential



Personal Information

Personal Information

	Client	Spouse
Full Name	_____	_____
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Social Security #	_____	_____
Date of Birth	____ / ____ / ____	____ / ____ / ____
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed
Email Address	_____	_____
Employment Status	<input type="checkbox"/> Retired <input type="checkbox"/> Employed <input type="checkbox"/> Business Owner <input type="checkbox"/> Homemaker <input type="checkbox"/> Not Currently Employed	<input type="checkbox"/> Retired <input type="checkbox"/> Employed <input type="checkbox"/> Business Owner <input type="checkbox"/> Homemaker <input type="checkbox"/> Not Currently Employed
Employment Income	\$ _____	\$ _____
Other Pre-Retirement Income <i>(non investment)</i>	\$ _____	\$ _____
State of Residence	_____	_____

Retirement Income

Social Security

Age to Begin Taking SS Client Spouse

Client - Select one Option:

- Use this amount: \$ _____ per month *(pre-tax, current dollars)*
 - Use the Planner Estimate *(based on current employment income)*
 - Use this percentage of the Planner Estimate: 75% 50% 25% 0%
 - I am ineligible for Social Security Benefits
- Assign to Goal: One Goal - _____ Priority Order

Spouse - Select one Option:

- Use this amount: \$ _____ per month *(pre-tax, current dollars)*
 - Use the Planner Estimate *(based on current employment income)*
 - Use this percentage of the Planner Estimate: 75% 50% 25% 0%
 - I am ineligible for Social Security Benefits
- Assign to Goal: One Goal - _____ Priority Order

Pensions

Whose Pension: Client Spouse Description: _____

Income Begins: Client Retires Spouse Retires Receiving Now Year _____

Monthly Amount of Benefit *(estimate of pre-tax future value)*: \$ _____

Will this Amount Inflate? No Yes, Base Inflation Rate Yes, Base Inflation Rate +/- _____%

(Note: Inflation will begin in the year payments start.)

Survivor Benefit: _____%

Assign to Goal: One Goal - _____ Priority Order

Whose Pension: Client Spouse Description: _____

Income Begins: Client Retires Spouse Retires Receiving Now Year _____

Monthly Amount of Benefit *(estimate of pre-tax future value)*: \$ _____

Will this Amount Inflate? No Yes, Base Inflation Rate Yes, Base Inflation Rate +/- _____%

(Note: Inflation will begin in the year payments start.)

Survivor Benefit: _____%

Assign to Goal: One Goal - _____ Priority Order

Part-time Work

Whose Income: Client Spouse Description: _____

Income Begins: Client Retires Spouse Retires Receiving Now Year _____

Number of Years: _____ Income When Work Begins: \$ _____ *(monthly, pre-tax, current dollars)*

Will this Amount Inflate? No Yes, Base Inflation Rate Yes, Base Inflation Rate +/- _____%

Assign to Goal: One Goal - _____ Priority Order

Retirement Income

Annuity Income

Whose Annuity: Client Spouse Description: _____

Year annuity payments start: _____

Value at Annuitization: \$ _____ Cost Basis: _____

Amount of annuity payments: \$ _____ *(monthly, pre-tax, future value)*

Income Growth Rate: _____% Exclusion Ratio: _____%

Annuity Type *(Choose one option)*

Joint Life

Income Guaranty: Period Certain Lifetime Only Installment Refund Cash Refund

If Period Certain, enter years: _____

Income to Spouse _____%

Single Life

Income Guaranty: Period Certain Lifetime Only Installment Refund Cash Refund

If Period Certain, enter years: _____

Specific Period Enter years: _____

Assign to Goal: One Goal - _____

Priority Order

Other Retirement Income (such as Rental Income, Alimony, etc.)

Whose Income: Client Spouse Description: _____

Income Begins: Client Retires Spouse Retires Receiving Now Year _____

Income Ends: End of Client's Plan End of Spouse's Plan End of Plan Year _____

Monthly Amount: \$ _____ *(pre-tax, today's dollars)* Is this income tax-free? No Yes

Will this Amount Inflate? No Yes, Base Rate Yes, Base Rate +/- _____%

Assign to Goal: One Goal - _____

Priority Order

Whose Income: Client Spouse Description: _____

Income Begins: Client Retires Spouse Retires Receiving Now Year _____

Income Ends: End of Client's Plan End of Spouse's Plan End of Plan Year _____

Monthly Amount: \$ _____ *(pre-tax, today's dollars)* Is this income tax-free? No Yes

Will this Amount Inflate? No Yes, Base Rate Yes, Base Rate +/- _____%

Assign to Goal: One Goal - _____

Priority Order

Investment Assets

Taxable

Who is the owner: Client Spouse Joint Custodial
If Joint, what kind? Survivorship Common Entirety Community Property
 Other w/ Client Other w/ Spouse

Description: _____

Current Value: \$ _____ Cost Basis: \$ _____

Assign to Goal(s): (Check one)

One Goal: _____ Priority Order Leave to Estate Not Used in Plan
 Multiple Goals: _____

Annual Additions: (Check one)

Additions: \$ _____ Inflate? No Yes

Year Additions Begin: _____

Year Additions End: Client Retires Spouse Retires Year _____

Asset Class Distribution:

CE _____% HYFI _____% LCCE _____% MCE _____% IE _____%
IGFI _____% LCVE _____% LCGE _____% SCE _____% IGFI _____%
UC _____%

Tax-Free

Who is the owner: Client Spouse Joint Custodial
If Joint, what kind? Survivorship Common Entirety Community Property
 Other w/ Client Other w/ Spouse

Description: _____

Current Value: \$ _____ Cost Basis: \$ _____

Assign to Goal(s): (Check one)

One Goal: _____ Priority Order Leave to Estate Not Used in Plan
 Multiple Goals: _____

Annual Additions: (Check one)

Additions: \$ _____ Inflate? No Yes

Year Additions Begin: _____

Year Additions End: Client Retires Spouse Retires Year _____

Asset Class Distribution:

CE _____% HYFI _____% LCCE _____% MCE _____% IE _____%
IGFI _____% LCVE _____% LCGE _____% SCE _____% IGFI _____%
UC _____%

Legend For Asset Class Distribution

CE = Cash & Cash Equivalents
IGFI = Investment Grade Fixed Income
HYFI = High Yield Fixed Income
Unclassified = All Other Asset Classes

LCVE = Large Cap Value Equities
LCCE = Large Cap Core Equities
LCGE = Large Cap Growth Equities
MCE = Mid Cap Equities

SCE = Small cap Equities
IE = International Equities
IGFI = International/Global Fixed Income

Investment Assets

Tax-Deferred

Who is the owner: Client Spouse Description: _____
Current Value: \$ _____ Cost Basis: \$ _____

Assign to Goal(s): *(Check one)*

- One Goal: _____ Priority Order Leave to Estate Not Used in Plan
 Multiple Goals: _____

Annual Additions: *(Check one)*

- Additions: \$ _____ Inflate? No Yes

Year Additions Begin: _____

Year Additions End: Client Retires Spouse Retires Year _____

Asset Class Distribution:

CE _____% HYFI _____% LCCE _____% MCE _____% IE _____%
IGFI _____% LCVE _____% LCGE _____% SCE _____% IGFI _____%
UC _____%

Client Signature: _____

Date: _____

Legend For Asset Class Distribution

CE = Cash & Cash Equivalents
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LCVE = Large Cap Value Equities
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