Retirement Readiness Questionnaire

Name

Client	
Spouse	

Desired Retirement Age

Client	Spouse

Desired Retirement Annual Income

Contact Information

Home Phone		Spouse Cell Phone	
Client Cell Phone		Fax	

Primary Email	

Home Address					
City		State		Zip	

Business Information

Client Employer		Spouse Employer	
Position		Position	
Client Work Phone		Spouse Work Phone	

Real Estate

	Primary Residence	*Secondary Residence*
Property Name:		
Current Value:		

Mortgages

	Primary Residence	*Secondary Residence*
Mortgage Name:		
Property Name:		
Original Loan Amount:		
Current Balance:		
Interest Rate:		
Loan Term (Years):		
Payment Frequency *(Monthly, Semi-Annually, Annually)*:		
Payment:		

Investments: Taxable

	(1)	*(2)*	*(3)*	*(4)*
Asset Name:				
Current Value:				
Tax Basis:				
List of Investments: (Tickers or a description)				

Investments: Qualified Retirement (401(k), IRA, Money Purchase, Profit Sharing, 403(b), 457, Pension, SEP, Other)

	(1)	*(2)*	*(3)*	*(4)*
Asset Name:				
Type *(401(k), IRA, Money Purchase, Profit Sharing, 403(b), Pension, SEP, Other)*				
Current Value:				
Your Contribution Schedule:				
Employer Contribution Schedule:				
List of investments: (Tickers or a description)				

Salary & Bonus

	(1)	(2)	(3)	(4)
Salary / Bonus Name:				
Annual Amount:				
Owner *(Client, Spouse, Joint)*:				

Social Security

	Client	Spouse
Estimated Benefit:		
Benefit Begins at Age:		

Other Retirement Income

	Client	Spouse
Estimated Benefit:		
Benefit Begins at Age:		

Expenses

Current Annual Expenses:	
Retirement Annual Expenses:	