# Retirement Zoomer™

## 👤 Personal Information

| | Client (C) | | Co-Client (Co) | |
|---|---|---|---|---|
| Name | | | | |
| Date of Birth | /    / | Gender ☐ M ☐ F | /    / | Gender ☐ M ☐ 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? | ☐ Yes    ☐ No    ☐ Receiving Now | ☐ Yes    ☐ No    ☐ Receiving Now |
| Amount of benefit/Age | $           ☐ Use Program Estimate | $           ☐ 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 | | | | | |
| | ☐ | ☐ | $ | | | ☐ | % |
| | ☐ | ☐ | $ | | | ☐ | % |
| | ☐ | ☐ | $ | | | ☐ | % |

## 🥧 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 |