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Retirement Planning Questionnaire

1. Do you make regular contributions to your retirement accounts?
2. Does your employer match your retirement contributions?
3. At what age do you plan to retire?
4. Do you have an opinion on your life expectancy (vs. industry standards)?
5. How much will you spend per year in retirement (as a % of current annual income)?
6. Will you be saving some of your “non-retirement” assets to help fund your retirement?
7. Do you have a current Social Security statement and your Primary Insurance Amount?
8. Will you have other recurring income or income generating events (sale of home, etc.) during retirement?

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9. Do you have a target rate of return prior to retirement? After retirement?

10. Do you have an income tax rate assumption prior to retirement? After retirement?

11. Do you wish to include an inflation factor in your retirement assumption?

12. Do you have a Long Term Care contract or rider on an insurance contract?

Notes: