



## Retirement Planning Questionnaire

1. Names \_\_\_\_\_
2. Children's Names \_\_\_\_\_
3. Address \_\_\_\_\_
4. Phone Home \_\_\_\_\_ Cell (H) \_\_\_\_\_ Cell (W) \_\_\_\_\_
5. Birth dates Husband \_\_\_\_\_ Wife \_\_\_\_\_
6. Planned Retirement Age Husband \_\_\_\_\_ Wife \_\_\_\_\_
7. Other than inflation, do you foresee significant changes in either of your annual gross incomes between now and retirement \_\_\_\_\_ If the answer is yes, provide details on the anticipated changes:
  
  
  
  
  
  
  
  
  
  
8. Estimated Social Security Benefits \* Husband \_\_\_\_\_ Wife \_\_\_\_\_

\* Provide the amount shown for your full retirement age. This information can be found on your annual Social Security Statement.



9. Will you receive a Pension at Age 65? Husband\_\_\_\_\_ Wife\_\_\_\_\_
10. If so, will it have COLA adjustments? Husband\_\_\_\_\_ Wife\_\_\_\_\_
11. Annual Pension Amount Husband\_\_\_\_\_ Wife\_\_\_\_\_
12. Current Retirement Account Savings Husband\_\_\_\_\_ Wife\_\_\_\_\_
13. Amount in 12. held in Roth Accounts Husband\_\_\_\_\_ Wife\_\_\_\_\_
14. Educational Savings Accounts \_\_\_\_\_
15. Taxable Savings & Brokerage Accounts \_\_\_\_\_
16. Value of Deferred Annuities \_\_\_\_\_
17. Value of other Liquid Assets \_\_\_\_\_
18. Net Value of Other Investments \* \_\_\_\_\_
19. Value of Home \_\_\_\_\_
20. Outstanding Mortgage Balance \_\_\_\_\_
21. Monthly Mortgage Payments \_\_\_\_\_ Years Remaining on Mortgage \_\_\_\_\_

\*This would include any non-liquid investment property other than real estate that you may sell before or during your retirement years. Any property that you would never sell should not be included in this number.



22. Other Real Estate Owned

Value of Property \_\_\_\_\_

Years Remaining on Mortgage \_\_\_\_\_

Annual HOA Fees \_\_\_\_\_

Annual Expenses\* \_\_\_\_\_

Mortgage Balance \_\_\_\_\_

Mortgage Payments \_\_\_\_\_

Property Taxes \_\_\_\_\_

Annual Income \_\_\_\_\_

Value of Property \_\_\_\_\_

Years Remaining on Mortgage \_\_\_\_\_

Annual HOA Fees \_\_\_\_\_

Annual Expenses\* \_\_\_\_\_

Mortgage Balance \_\_\_\_\_

Mortgage Payments \_\_\_\_\_

Property Taxes \_\_\_\_\_

Annual Income \_\_\_\_\_

Value of Property \_\_\_\_\_

Years Remaining on Mortgage \_\_\_\_\_

Annual HOA Fees \_\_\_\_\_

Annual Expenses\* \_\_\_\_\_

Mortgage Balance \_\_\_\_\_

Mortgage Payments \_\_\_\_\_

Property Taxes \_\_\_\_\_

Annual Income \_\_\_\_\_



23. Privately Owned Business? \_\_\_\_\_

If Yes, describe your plans for the business when you retire. If you plan to sell the business, provide an estimated net value (after capital gains taxes) and the year in which you expect to sell your business. If you expect to keep the business in your family, provide the estimated annual income that you expect to receive after your retirement.

24. 2008 Educational Expenses \_\_\_\_\_

25. Provide estimated changes in annual educational expenses from 2009 until they will no longer be required.

26. Do you or your spouse plan to work part time during your retirement years? \_\_\_\_\_ If so, please provide the anticipated annual income (in today's dollars) and the number of years that you would plan on working.

27. Do you have long term care insurance? \_\_\_\_\_



Now let's look at areas where your spending may change during your retirement years. For each of the following areas, provide either a positive number for anticipated spending increases or a negative number for spending decreases. Leave blank if you anticipate no change in spending during retirement.

1. Clothes \_\_\_\_\_
2. Automobiles \_\_\_\_\_
3. Travel \_\_\_\_\_
4. Eating Out \_\_\_\_\_
5. Disability Insurance \_\_\_\_\_
6. Life Insurance \_\_\_\_\_
7. Income Taxes \_\_\_\_\_
8. Social Security Taxes \_\_\_\_\_
9. Medical Expenses \_\_\_\_\_
10. Second Home \_\_\_\_\_
11. Other \_\_\_\_\_