

Retirement Lifestyle Plan **Employed**



Personal Information

	Client (C)	Co-Client (Co)
Name		
Gender	Male Female	Male Female
Date of Birth	/ /	/ /
Email Address		
Employment Status	Employed Retired Business Owner Homemaker	Employed Retired Business Owner Homemaker
Employment Income	\$	\$
Other Income (non-investment only)	\$	\$
Marital Status		State of Residence

Important Relationships

Children, grandchildren or any participant included in this plan.

Name	Date of Birth	Relationship
	/ /	
	/ /	
	/ /	

Retirement Age

At what age would you like to retire?	Client (e.g., age 65)	Co-Client (e.g., age 65, together)	Your living expense will be estimated (approximately 60%-70% of total employment income) and two goals will be created: Basic Living Expense (Need) and Extra Living Expense (Want).

Social Security Benefits - if available, provide your Social Security estimate from ssa.gov.

	Client	Co-Client
Are you eligible?	Yes No Receiving Now	Yes No Receiving Now
Benefit amount	Primary Insurance Amount (PIA) \$ _____	Primary Insurance Amount (PIA) \$ _____
When to start	at Full Retirement Age (per Social Security) at age _____ at retirement	at Full Retirement Age (per Social Security) at age _____ at retirement

Retirement Income

(Pension, part-time work, rental property, annuities, royalties, alimony)

Description	Owner		Monthly Income	Start Year	Year It Ends or No. of Years	% Survivor Benefit	Check if amount inflates	GPO
	C	Co						
e.g., ABC Pension			\$ 1,500		End of Life	50%		
			\$					
			\$					
			\$					

Investment Assets

Investment Type	Client		Co-Client	
	Current Value	Annual Additions	Current Value	Annual Additions
Retirement Plans (e.g., 401k, 403b)	\$	\$ or %	\$	\$ or %
Employer Match	\$	\$ or %	\$	\$ or %
Traditional IRA	\$	\$	\$	\$
Roth IRA	\$	\$	\$	\$
529 Savings Plan	\$	\$	\$	\$
Annuities	\$	\$	\$	\$
HSA	\$	\$	\$	\$
Taxable / Brokerage	\$	\$	\$	\$
Other	\$	\$	\$	\$

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?

Client	Co-Client

