



FOURWORD FINANCIAL
PLAN NOW, PLAY LATER!

My Retirement Outlook Intake Form

Tell Us About Yourself		
Client Name:		Spouse/Partner Name:
Date of Birth:		Date of Birth:
Current annual salary:		Current annual salary:
Assumed annual salary increases (%):		Assumed annual salary increases (%):
Number of paychecks received each year:		Number of paychecks received each year:
Anticipated retirement age:		Anticipated retirement age:
Anticipated years in retirement:		Anticipated years in retirement:
Tell Us About Your Retirement Income And Savings		
Current savings earmarked for retirement:		
Will you be eligible to receive Social Security benefits when you retire?		
Anticipated Social Security start age:		
My estimated annual Social Security benefit at age 67:		
Does your employer contribute to a defined contribution plan on your behalf?		
Do you participate in a defined benefit retirement system (pension plan)?		
My employer will match _____ % up to the first _____ % of my pay.		
My employer will match _____ % on the next _____ % of my pay.		
Match up to a maximum of _____ annually.		
My employer will contribute _____ each year to my voluntary account.		
My employer will contribute _____ % of my annual salary each year to my voluntary account.		
Tell Us About Your Retirement Benefits		
Estimated Pension Benefit:		Which retirement system is holds you annual pension benefits:
Total years of service (by year-end) in the selected retirement system:		
PRE-TAX CONTRIBUTIONS (per paycheck)		AFTER-TAX CONTRIBUTIONS (per paycheck)
Qualified Plan Contribution (403(b)):		Roth Contribution (403(b)):
Age 50 Catch-up Contribution:		Age 50 Catch-up Contribution:
Qualified Plan Contribution (457(b)):		Roth Contribution (457(b)):
Age 50 Catch-up Contribution:		Age 50 Catch-up Contribution:
Rate of return before retirement:	Rate of return during retirement:	After-tax contribution:

Investment advisor representative and registered representative of, and securities and investment advisory services offered through Voya Financial Advisors, Inc. (Member SIPC).
FourWord Financial is not a subsidiary of nor controlled by Voya Financial Advisors.
Neither Voya Financial Advisors nor its representatives offer tax or legal advice. Please consult with your tax and legal advisors regarding your individual situation.

CN3542931_0526



VOYA FINANCIAL ADVISORS