PEAK
BROKERAGE SERVICES

Relationship Status (Circle one) ☐ Married ☐ Single ☐ Widow ☐ Divorced

If Divorced or Widowed - Date of Divorce or Death of Spouse ______________________________

Estimated Monthly Retirement Income Budget: ____

Client #1

First Name ____________________ Last Name ____________________________________

Date of Birth _______________ Gender M◯F◯ Life Expectancy/Age: ________________

Client #2

First Name ____________________ Last Name ____________________________________

Date of Birth _______________ Gender M◯F◯ Life Expectancy/Age: ________________

At what age do you plan on starting Social Security? Client#1 ________ Client#2__________________

What is the monthly Primary Insurance Amount ("Estimated Be ne fit at Full Retirement ")?

Client #1: $______________________ Client#2: $_________________________

Directions to get your "Primary Insurance Amount" (Full Benefit Amount on Social Security Statement)

- http://www.ssa.gov/
- Click the "BENEFITS" ta b and under "Manage" - click on "Check your information or benefits"
- To "Create an Account" o pen "*my* Social Security" link
- Create an account if you are new user (you will need a valid E-mail address, a Social Security Number, U.S. mailing address, and be 18 years of age or older)
- Write the "Estimated Be n e fit at Full Retirement" in the appropriate boxes above
- Print and save (PDF) full statement. Bring a hard copy to the meet in g. Save for your records.

Do you have a " Non-Covered Pension" (this is not common)?

This applies to some federal, police, ministerial, teachers, and other public employees. Yes / No

If Yes, please complete the following table

	Client #1	Client#2
Monthly Pension Amount	$	$
Pension Start Date	________/__________/_______	________/__________/_______
Pension Growth Rate %	____________%	____________%

Tell Us about your Assets & Tax Bracket

Assets		Tax Bracket	
Qualified (IRA, 401k, 403b	$	Marginal Tax Bracket While Working	
Non-Qualified (Savings, Brokerage Accounts	$	Retirement Pre Age 70	
Tax Free (Roth IRA)	$	Retirement Post Age 70%	

Dennis B. Pellegrini – 49 Commerce Dr. Wyomissing PA 19610 – (610) 898-1241