Please provide the following information:

Client Name(s):	
Company/Employer:	
SSN/Employer ID:	
Phone:	
Email:	
Street Address 1:	
Street Address 2:	
City:	
State:	Zipcode:

Personal Information:

	Spouse 1	Spouse 2
Age/Birthdate		
Annual Salary/Income:		
Raise Factor:		
Other Income:		
Social Security:		
Pension 1:		
Pension 2:		
Retirement Income Goal (combined):		
Other:		

Ongoing Savings and Contributions:

	Spouse 1	Spouse 2
Qualified Tax Deferred Accounts		
- Qualified 401k/403b/457 Balances($)		
- Annual Contributions		
- Employer or Company Match (% or $)		
Non-Qualified Tax Deferred Accounts		
- Non-Qualified Annuity Value($)		
- Annual Contributions		
- Cost Basis		
Traditional IRA Account Value		
- Annual Contribution		
Roth IRA Account Value		
- Annual Contribution		
Other Taxable Savings Value		
- Annual Contributions		

Other Retirement Income Items (Cash Infusions):

	Current Value:	Start Age:	Duration:
Sale or Downsize Primary Home			
Inheritance			
Part-time Job			
Retirement Package/Severance			
Rental Property Income			
Deferred Comp			
Spouse Still working when 1st retires			
Annuity Income			
Life Insurance Proceeds			
Reverse Mortgage			
Other Lumpsum			

Other Payments	
Sale of Business	

Other Retirement Income Expenses (Special Expenses):

	Current Cost/Value:	Start Age:	Duration (years):
Purchase 2nd Home			
Big Travel Plans/Vacations			
Purchase RV			
Fund College Education			
Buy Annuity			
LTC Expense			
LTCi Premiums			
Life Insurance Premiums			
Medical Expenses			
Wedding			
Cars			
Other			

Detailed List of Investments/Accounts:

Enter any investment accounts or specific investments by name in the table below. This includes 401k, 403b, 457 accounts or the funds in them, mutual funds, bonds, tax free bonds, real estate, stocks, money markets, savings, real estate, and other other investments or savings that you will use to fund your retirement.

Description:	Current Value($):	Estimated Return:	Tax Type: (Tax-Deferred, Taxable, or Tax-Free)