
Fillable Forms Requirements

This form (PDF) requires the use of Acrobat Reader to edit and save changes.

I have Acrobat Reader installed:

- Simply open the fillable form in Acrobat Reader, make your changes, save, and email back to the sender.

I don't have Acrobat Reader installed:

- Download the free version here <https://get2.adobe.com/reader/otherversions/> and follow the on-screen instructions to install the program.
- Once installed, reopen this PDF file to have it automatically open in Acrobat Reader.
- Finally, please make your changes, save, and email back to the sender.

Retirement

Instructions

Personal information: Enter your name, date of birth and the age at which you would like to retire.

	Name	Date of Birth	Retirement age
Client 1			
Client 2			

Are you married? _____

Income Needs

Think about how much you spend each month today. If you were to retire tomorrow, how much monthly income would you want to receive, take into consideration housing, including mortgage payments if any, travel, food, vacations etc.? \$_____

If you currently have a mortgage, what is the monthly payment? _____

When is the last payment due? _____

Income Sources

Employment income

Client 1 \$_____ Client 2 \$_____

Will you be eligible to collect social security? Client 1_____ Client 2_____

Retirement

Will you be receiving any monthly income during retirement, besides social security such as from rental property income, an annuity, or pension? Do not include any income from retirement plans such as 401(k), 403(b), IRA, Roth IRA, etc. Enter the monthly amount you expect to receive in the future.

Income Source	Who owns the account	Monthly amount to be received	Income starts at age	Income stops at age	If you become deceased, is the income available to your partner?
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Do you anticipate receiving any other money such as an inheritance or money from the sale of a business or home?

Income Source	Who owns the account	Single amount to be received	What age do you expect to receive it	If you become deceased, is the income available to your partner?
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Retirement

Capital assets

If you, or your partner have any retirement plans, please enter the information below:

Who owns the account	Current balance	Amount you contribute each month	Amount your employer contributes each month	Average rate of return you expect to receive on this account

List the amount for any other assets which can be used to fund your retirement

Current balance	Amount you contribute each month	Average rate of return you expect to receive on this account

Contact Information

Address:

Phone: