Retirement Income Planner

CLIENT PROFILE

Date ______________________
(mm/dd/yyyy)

Full Name ______________________ ________ ______________________
First MI Last

Social Security # ______________________ **Date of Birth** ______________________
(mm/dd/yyyy)

Spouse's Full Name ______________________ ________ ______________________
First MI Last

Phone # ______________________ **Best time to contact** ______________________

E-mail Address ______________________

Employer ______________________ **# Paychecks/Year** ______________________

Income		Taxation	
Gross income per paycheck	$ ________	Federal status	○ Married ○ Single
Additional income	$ ________	# of exemptions claimed	________
Summer income	$ ________	Additional federal tax	$ ________
Pretax Withdrawals		State status	○ Married ○ Single
Pretax 125	$ ________	# of exemptions claimed	________
403(b)	$ ________	Additional state tax	$ ________
457	$ ________	Local tax withholding	________ %
401(k)	$ ________		

After-tax Deductions					
After-tax retirement	$ ________	Union dues	$ ________	Credit Union	$ ________
Major medical	$ ________	Dental	$ ________	Cancer insurance	$ ________
Vision	$ ________	Long-term disability	$ ________	Other insurance	$ ________
Term life insurance	$ ________	Deductible/Co-pays	$ ________	Dependent care	$ ________
Other	$ ________				
Total After-tax Deductions	$ ________				

I plan to retire at age ______________________

I would like to see an illustration of the benefit of contributing $ ____________ **per paycheck to a retirement savings program.**

I would be interested in:

- ☐ Paycheck Analysis
- ☐ Retirement Analysis
- ☐ Projected savings at retirement analysis
- ☐ Pension Analysis
- ☐ Asset Allocation Analysis