RETIREMENT INCOME

Social Security					
When will you begin taking Social Security?					
		Full Retirement Age (FRA)	CO-CLIENT		Full Retirement Age (FRA)
CLIENT		As early as possible			As early as possible
		Retirement			Retirement
		Age			Age
		I am ineligible for Social Security benefits			I am ineligible for Social Security benefits
Do you plan to use a strategy to maximize Socia			cial Security	? If	yes check the applicable option.
CLIENT		File and Suspend	CO-CLIENT		File and Suspend
		Restricted Application			Restricted Application
Select one option for the benefit amount:					
		Use this amount: \$			Use this amount: \$
		Month D Year (pre-tax, current dollars)	CO-CLIENT		Month D Year (pre-tax, current dollars)
CLIENT		Use the planner estimate (based on current employment income)			Use the planner estimate (based on current employment income)
		Estimate the benefit using my Primary Insurance Amount: \$			Estimate the benefit using my Primary Insurance Amount: \$
		Assign – How t	o Use: (choos	e on	e)
CLIENT		Fund All Goals	CO-CLIENT		Fund All Goals
CLIENT		Earmark to One Goal:			Earmark to One Goal:
		Pe	nsion		
Whose pen	sion	: □Client □ Co-Client	Whose pension: Client Co-Client		
Description):		Description:		
Income begins: Client's Retirement Co-Client's Retirement Year			Ŭ		□ Client's Retirement tirement □ Receiving Now □ Year
Amount of	bene	fit (estimate of pre-tax future value):	Amount of benefit (estimate of pre-tax future value):		
		\$per □ Month □Year	\$per □ Month □Year		
		t inflate? \Box No \Box Yes, Base Inflation Rate	Will this amount inflate? \Box No \Box Yes, Base Inflation Rate		
		ation Rate +/%	□Yes, Base Inflation Rate +/%		
(Note: Inflation will begin in the year payments begin.)			(Note: Inflation will begin in the year payments begin.)		
Survivor benefit:			Survivor benefit:		
Assign – How to Use: (choose one)			Assign – How to Use: (choose one) □ Fund All Goals		
□ Fund An Goals □ Earmark to One Goal:			□ Fund An Goals □ Earmark to One Goal:		

Part-Time E	mployment	
Whose income: Client Co-Client	Whose income: Client Co-Client	
Description:	Description:	
Income begins: Client's Retirement Co-Client's Retirement Receiving Now Year	Income begins: Client's Retirement Co-Client's Retirement Keceiving Now Year	
Number of years:	Number of years:	
Income amount (pre-tax, today's dollars): \$per Month □Year	Income amount (pre-tax, today's dollars): \$per	
Will this amount inflate? No Yes, Base Inflation Rate Yes, Base Inflation Rate +/% (Note: Inflation will begin in the year payments begin.)	Will this amount inflate? No Yes, Base Inflation Rate Yes, Base Inflation Rate +/% (Note: Inflation will begin in the year payments begin.)	
Assign – How to Use: (choose one) □ Fund All Goals □ Earmark to One Goal:	Assign – How to Use: (choose one) □ Fund All Goals □ Earmark to One Goal:	

Annuity	Income
Whose income: Client Co-Client	Description:
Description:	□ Joint Life Income Guaranty: □ Period Certain
Year annuity payments start:	□ Lifetime Only □ Installment Refund □ Cash Refund
Amount of annuity payments (pre-tax, future value): \$per □ Month □Year	If Period Certain, enter years:%
Income growth rate:% Exclusion ratio%	□ Lifetime Only □ Installment Refund □ Cash Refund
Assign – How to Use: (choose one) □ Fund All Goals □ Earmark to One Goal:	If Period Certain, enter years:%
	Specific Period Enter years:

Rental Prop	erty Income		
Whose income: Client Co-Client	Description:		
Income begins: Client's Retirement Co-Client's Retirement Receiving Now Year	Income ends: □ End of Client's Plan □ End of Co-Client's Plan □ Year		
Amount of net rental income (pre-tax rental income less expenses): \$ Month □ Year			
Will this amount inflate? □ No □ Yes, Base Inflation Rate □ Yes, Base Inflation Rate +/%	Assign – How to Use: (choose one)		

Other Retire	ment Income		
Whose income: Client Co-Client	Description:		
Income begins: Client's Retirement Co-Client's Retirement Receiving Now Year	Income ends: □ End of Client's Plan □ End of Co-Client's Plan □ End of Plan □ Year		
Amount of income (pre-tax rental income less expenses):	Is this income tax-free? 🗆 No 🗆 Yes		
Will this amount inflate? □ No □ Yes, Base Inflation Rate □ Yes, Base Inflation Rate +/%	Assign – How to Use: (choose one) □ Fund All Goals □ Earmark to One Goal:		

Other Retire	ment Income
Whose income: Client Co-Client	Description:
Income begins: Client's Retirement Co-Client's Retirement Receiving Now Year	Income ends: □ End of Client's Plan □ End of Co-Client's Plan □ End of Plan □ Year
Amount of income (pre-tax rental income less expenses): \$ Month _ Year	Is this income tax-free? 🗆 No 🛛 Yes
Will this amount inflate? □ No □ Yes, Base Inflation Rate □ Yes, Base Inflation Rate +/%	Assign – How to Use: (choose one)
Whose income: Client Co-Client	Description:
Income begins: Client's Retirement Co-Client's Retirement Receiving Now Year	Income ends: □ End of Client's Plan □ End of Co-Client's Plan □ End of Plan □ Year
Amount of income (pre-tax rental income less expenses): \$ Month Quar	Is this income tax-free? 🗆 No 🛛 Yes
Will this amount inflate? □ No □ Yes, Base Inflation Rate □ Yes, Base Inflation Rate +/%	Assign – How to Use: (choose one) □ Fund All Goals □ Earmark to One Goal:
Other Irrevocat	le Trust Income
Other Irrevocate	
	le Trust Income
Whose income: Client Co-Client Income begins: Client's Retirement Co-Client's Retirement	Description: Income ends: End of Client's Plan End of Co-Client's Plan
Whose income: Client Co-Client Income begins: Client's Retirement Co-Client's Retirement Receiving Now Year Amount of income (pre-tax rental income less expenses):	Description: Income ends: End of Client's Plan End of Co-Client's Plan End of Plan Year
Whose income: Client Co-Client Income begins: Co-Client's Retirement Retirement Receiving Now Year Year Amount of income (pre-tax rental income less expenses): Month Year Will this amount inflate? No Yes, Base Inflation Rate	Description: Income ends: End of Client's Plan End of Co-Client's Plan End of Plan Year Is this income tax-free? No Yes Assign – How to Use: (choose one) Fund All Goals
Whose income: Client Co-Client Income begins: Co-Client's Retirement Retirement Receiving Now Year Year Amount of income (pre-tax rental income less expenses): Month Year Will this amount inflate? No Yes, Base Inflation Rate %	Description: Income ends: End of Client's Plan End of Co-Client's Plan End of Plan Year Is this income tax-free? No Yes Assign – How to Use: (choose one) Fund All Goals Earmark to One Goal:
Whose income: Client Co-Client Income begins: Co-Client's Retirement Co-Client's Retirement Receiving Now Year Year Amount of income (pre-tax rental income less expenses): \$ Month Year Will this amount inflate? No Yes, Base Inflation Rate % Yes, Base Inflation Rate +/% Whose income: Client Co-Client Income begins: Client's Retirement Co-Client's Retirement	Description: Income ends: End of Client's Plan End of Co-Client's Plan End of Plan Year Is this income tax-free? No Yes Assign – How to Use: (choose one) Fund All Goals Earmark to One Goal: Description: Income ends: End of Client's Plan End of Co-Client's Plan

