

Social Security Zoomer[®]



Personal Information

	Client (C)		Co-Client (Co)	
Name				
Gender	Male	Female	Male	Female
Date of Birth	/	/	/	/
Email Address				
Employment Status	Employed Business Owner	Retired Homemaker	Employed Business Owner	Retired Homemaker
Employment Income	\$		\$	
Marital Status		State of Residence		

Identify the resources you have to fund your retirement. The program will estimate your Living Expenses.

Social Security Benefits - If available, provide your Social Security estimate from ssa.gov.

	Client		Co-Client	
Are you eligible?	Yes No	Receiving Now: \$ _____	Yes No	Receiving Now: \$ _____
Benefit amount	Primary Insurance Amount (PIA) \$ _____		Primary Insurance Amount (PIA) \$ _____	
When to start	At Full Retirement Age (per Social Security) at age _____ at retirement		At Full Retirement Age (per Social Security) at age _____ at retirement	

Retirement Income

If available, provide your pension statement. If unavailable, provide information below.
If you have a lifetime pension, put "End of Life" in "Year It Ends" column.

Description	Owner		Monthly Income	Start Year	Year It Ends or No. of Years	% Survivor Benefit	Check if amount inflates	GPO
	C	Co						
e.g., ABC Pension			\$ 1,500		End of Life	50%		
			\$					
			\$					
			\$					

Investment Assets

Identify all the resources you have to fund your Goals. Don't worry about determining the exact amounts, reasonable estimates are fine. If available provide your investment statements.

Estimate of overall allocation (client and co-client): Cash _____% Bond _____% Stock _____%

Client

Investment Type	Current Value	Annual Additions	Approximate Allocation		
			Cash	Bond	Stock
Retirement Plans (e.g., 401k, 403b)	\$	\$ or %	%	%	%
• Employer Match	\$	\$ or %			
Traditional IRA	\$	\$	%	%	%
Roth IRA	\$	\$	%	%	%
529 Savings Plan	\$	\$	%	%	%
Annuities	\$	\$	%	%	%
HSA	\$	\$	%	%	%
Taxable / Brokerage	\$	\$			
Other:	\$	\$			

Co-Client

Investment Type	Current Value	Annual Additions	Approximate Allocation		
			Cash	Bond	Stock
Retirement Plans (e.g., 401k, 403b)	\$	\$ or %	%	%	%
• Employer Match	\$	\$ or %			
Traditional IRA	\$	\$	%	%	%
Roth IRA	\$	\$	%	%	%
529 Savings Plan	\$	\$	%	%	%
Annuities	\$	\$	%	%	%
HSA	\$	\$	%	%	%
Taxable / Brokerage	\$	\$			
Other:	\$	\$			

Risk Score

How much market risk are you willing to accept? On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what's your risk score? If you're not sure, go ahead and guess. You can always talk with your advisor and revise if needed.

Client	Co-Client



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800.743.7092

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