

Your Retirement: Questionnaire

Name: _____ Name of Co-Client: _____

When do you want to retire?

Desired Retirement Age or Date: You _____
Date of Birth _____
Earned Income _____

Co-Client _____
Date of Birth _____
Earned Income _____

What do you want to spend in retirement?

Ongoing spending in retirement

Think about how much you'll need monthly to live your desired lifestyle (in today's dollars). If you'd like to be more specific, use the Additional Details section on page 4. Debt payments will be covered in a later section, so do not include them as part of your spending here.

Necessary: \$ _____
(rent, homeowners and other insurance, taxes, utilities, food, transportation, health care, etc.)

Discretionary: \$ _____
(entertainment, travel, gifts, charitable contributions, etc.)

Other spending (variable time frames during retirement)

What other spending do you anticipate throughout retirement? Consider potential one-time expenses or those that may vary over time, like travel or a car purchase.

Description _____ Frequency: _____
Amount: \$ _____ Start/Stop Date: _____

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Amount: \$ _____ Start/Stop Date: _____

Liabilities: What debts (like a mortgage or car loan) are you carrying? For a mortgage, only include principal and interest in the monthly payment.

Description _____ Date of Most Recent Payment _____
Current Balance \$ _____ Monthly Payment \$ _____ Interest Rate % _____

Description _____ Date of Most Recent Payment _____
Current Balance \$ _____ Monthly Payment \$ _____ Interest Rate % _____

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(Continued) Liabilities: What debts (like a mortgage or car loan) are you carrying? For a mortgage, only include principal and interest in the monthly payment.

Description _____ Date of Most Recent Payment _____

Current Balance \$ _____ Monthly Payment \$ _____ Interest Rate % _____

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Current Balance \$ _____ Monthly Payment \$ _____ Interest Rate % _____

Description _____ Date of Most Recent Payment _____

Current Balance \$ _____ Monthly Payment \$ _____ Interest Rate % _____

What are your plans for Social Security?

To create a better picture of your retirement income, please provide as much information regarding your Social Security benefits as possible.

What information do you have regarding your Social Security benefits? (choose one)

Wedding date (if married): _____

My actual benefit amount (I'm already receiving benefits)

Monthly Benefit \$ _____ Age Started _____

My benefit amount from a recent Social Security statement (or www.socialsecurity.gov/begin-est)

Monthly benefit at full retirement age: \$ _____

Plan to start Social Security benefits at age: _____

Will you receive a pension from employment in which you did not pay Social Security taxes? (examples include government and teachers' pensions) Yes No

Do not include Social Security in my analysis

Co-Client: What information do you have regarding your Social Security benefits? (choose one)

My actual benefit amount (I'm already receiving benefits)

Monthly Benefit \$ _____ Age Started _____

My benefit amount from a recent Social Security statement (or www.socialsecurity.gov/begin-est)

Monthly benefit at full retirement age: \$ _____

Plan to start Social Security benefits at age: _____

Will you receive a pension from employment in which you did not pay Social Security taxes? (examples include government and teachers' pensions) Yes No

Do not include Social Security in my analysis

What other sources of income will you have in retirement?

Other than Social Security and income from your investments, what other income do you expect to collect while in retirement? Consider things like pensions, rental income, part-time employment, and annuities.

You Co-Client Description _____

Frequency _____ Amount \$ _____

Start Date _____ Survivor benefit (if applicable): _____

You Co-Client Description _____

Frequency _____ Amount \$ _____

Start Date _____ Survivor benefit (if applicable): _____

You Co-Client Description _____

Frequency _____ Amount \$ _____

Start Date _____ Survivor benefit (if applicable): _____

What other assets do you have assigned to retirement?

Consider what existing assets you have that are earmarked for retirement outside of your Edward Jones accounts (e.g., a 401(k) or bank CD).

Owner	Description	Balance
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

What are your current savings and contributions for retirement?

How much money are you currently saving for retirement? Break out your savings by type of account.

You Co-Client Description _____

Frequency _____ Amount \$ _____

Employer Contribution \$ _____ Annual Savings Rate Increase _____

You Co-Client Description _____

Frequency _____ Amount \$ _____

Employer Contribution \$ _____ Annual Savings Rate Increase _____

You Co-Client Description _____

Frequency _____ Amount \$ _____

Employer Contribution \$ _____ Annual Savings Rate Increase _____

ADDITIONAL DETAILS (optional)

What do you want to spend in retirement?	Monthly
Rent	\$ _____
Homeowners/Renters Insurance	\$ _____
Health Insurance	\$ _____
Auto Insurance	\$ _____
Property Taxes (Real Estate/Vehicle)	\$ _____
Home Repairs/Maintenance	\$ _____
Utilities (Gas/Electric/Phone/Water, etc.)	\$ _____
Groceries	\$ _____
Personal (Toiletries/Dry Cleaning/Housekeeping)	\$ _____
Entertainment (Dining Out/Travel/Vacation)	\$ _____
Clothing	\$ _____
Gifts (Birthday/Holiday/Special Occasion)	\$ _____
Transportation (Gas/Taxis/Maintenance/Parking)	\$ _____
Charitable Contributions	\$ _____
Dependent Care (Lessons/Sports/Child Support)	\$ _____
Other	\$ _____
SUBTOTAL	\$ _____

If you have additional spending, income or savings information that was not captured, please describe here.



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