



# Social Security Zoomer™

## Personal Information

|                   | Client (C) |   |  | Co-Client (Co)     |   |  |
|-------------------|------------|---|--|--------------------|---|--|
| Name              |            |   |  |                    |   |  |
| Date of Birth     | /          | / | Gender <input type="checkbox"/> M <input type="checkbox"/> F | /                  | / | Gender <input type="checkbox"/> M <input type="checkbox"/> F |
| 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

|  | Client   |                             |  | Co-Client  |                             |  |
|--|--|-----------------------------|--|--|-----------------------------|--|
| Are you eligible?                              | <input type="checkbox"/> Yes                     | <input type="checkbox"/> No | <input type="checkbox"/> Receiving Now | <input type="checkbox"/> Yes                     | <input type="checkbox"/> No | <input type="checkbox"/> Receiving Now |
| Amount of benefit/Age                          | \$ <input type="checkbox"/> Use Program Estimate |                             |  | \$ <input type="checkbox"/> Use Program Estimate |                             |  |
| Include Social Security Maximization analysis? |  |                             |  | <input type="checkbox"/> Yes                     |                             |  |

## \$ Retirement Income (pension, part-time work, rental property, annuities, royalties, alimony)

| Description | Owner                    |                          | Monthly Amount | Starts | Ends | Inflates?                | % Survivor (Pension Only) |
|-------------|--------------------------|--------------------------|----------------|--------|------|--------------------------|---------------------------|
|             | C                        | Co                       |                |        |      |                          |                           |
|             | <input type="checkbox"/> | <input type="checkbox"/> | \$             |        |      | <input type="checkbox"/> | %                         |
|             | <input type="checkbox"/> | <input type="checkbox"/> | \$             |        |      | <input type="checkbox"/> | %                         |
|             | <input type="checkbox"/> | <input type="checkbox"/> | \$             |        |      | <input type="checkbox"/> | %                         |

## Investment Assets

Estimate of overall allocation: Cash \_\_\_\_% Bond \_\_\_\_% Stock \_\_\_\_%

| Description                    | Client |                  | Co-Client |                  |
|--------------------------------|--------|------------------|-----------|------------------|
|                                | Value  | Annual Additions | Value     | Annual Additions |
| Total Employer Retirement Plan | \$     | \$               | \$        | \$               |
| Total Traditional IRA          | \$     | \$               | \$        | \$               |
| Total Roth IRA                 | \$     | \$               | \$        | \$               |
| Total Tax-Deferred             | \$     | \$               | \$        | \$               |

| Joint Assets  | Value | Annual Additions | Joint Assets   | Value | Annual Additions |
|---------------|-------|------------------|----------------|-------|------------------|
| Total Taxable | \$    | \$               | Total Tax-Free | \$    | \$               |

## 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?

| Household | Client | Co-Client |
|-----------|--------|-----------|
|           |        |           |

Two thirds of all investors score between 40 and 60, and only 1 in 1000 select a score lower than 20 or greater than 80. Does your score feel right as you compare yourself to others?

|           | Household |       |      | Men  |       |      | Women |       |      |
|-----------|-----------|-------|------|------|-------|------|-------|-------|------|
| Age Group | > 64      | 50-64 | < 50 | > 64 | 50-64 | < 50 | > 64  | 50-64 | < 50 |
| Avg Score | 47        | 50    | 54   | 50   | 54    | 59   | 45    | 48    | 52   |

