

MoneyGuideOne

Lifestyle Plan



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	\$		\$	
Other Income (non-investment only)	\$		\$	
Marital Status			State of Residence	

Retirement Age

At what age would you like to retire?	Client (e.g., age 65)	Co-Client (e.g., age 65, together)	Your living expense will be estimated (approximately 60%-70% of total employment income) and three goals will be created: Need, Want and Wish.

Retirement Lifestyle Goals

Lifestyle Goals are above and beyond what you need to pay for basic expenses. Rate the importance of each Goal on a scale of 10 ↔ 1. Needs (10, 9, 8), Wants (7, 6, 5, 4), and Wishes (3, 2, 1).

Most Common Goals		Other Goals		
Travel	College	Wedding	New Home	Celebration
Car	Home Improvement	Major Purchase	Start Business	Provide Care
Health Care	Gift or Donation	Leave Bequest	Private School	Other

Importance High Low 10 ↔ 1	Description	Start Year	C	Co	Amount	How Often	How Many Times
					\$		
					\$		
					\$		
					\$		
					\$		

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 (Pension, part-time work, rental property, annuities, royalties, alimony)

Description	Owner		Monthly Income	Start Year	Year It Ends or No. of Years	% Survivor Benefit	Check if amount inflates	GPO
	C	Co						
			\$					
			\$					
			\$					
			\$					

Investment Assets

	Client			Co-Client		
Investment Type	Current Value	Annual Additions		Current Value	Annual Additions	
Retirement Plans (e.g., 401k, 403b)	\$	\$	or %	\$	\$	or %
• Employer Match	\$	\$	or %	\$	\$	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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