What Baby Boomers Need To Know TO Maximize Retirement Income

Social Security Planning Questionnaire Page 1

Leave a blank for anything you're not sure of – we will complete those together

Use the second page to add information as needed

Overview Information	Spouse/Partner			Spouse/Partner		
Name:						
Date of birth & current age:						
Are you working full or part-time?						
When do you plan/hope to retire?						
Intend to work once retired?						
To what age do you expect to live?						
Income						
Any Social Security benefit:	$			$		
Any disability income:	$			$		
Any investment income:	$			$		
Income from work:	$			$		
Other income (explain):	$			$		
Total current annual income:	$			$		
Desired annual retirement income:	$			$		
Marriage						
Date of current marriage:						
Former marriage(s):						
1. Date married/ended/total years						
Reason ended: Death or divorce						
2. Date married/ended/total years						
Reason ended: Death or divorce						
Social Security & Other						
Social Security benefit estimate:	$			$		
Any non-Soc. Sec. pension? If yes:						
Employer name(s)						
Number of years worked						
When entitled to draw pension(s)						
Amount(s) of pension benefit	$			$		

Continued on next page

Social Security Planning Questionnaire Page 2

Leave a blank for anything you're not sure of – we will complete those together

	Spouse/Partner	Spouse/Partner
Continued information for:		
Separate assets		
Retirement accounts	$	$
Checking accounts	$	$
Savings accounts	$	$
Investment accounts	$	$
Real estate not including home	$	$
Home, if not owned jointly	$	$
Other (explain)	$	$
Total separate assets	$	$

Joint assets	
Checking accounts	$
Savings accounts	$
Investment accounts	$
Real estate not including home	$
Real estate – home	$
Other (explain)	$
Total joint assets	$
Are assets in a Trust?	If there is a Trust but some of the above assets are *not* included please mark them.
Are there minor children living at home with you? If yes, please list their names and ages:	

Add information here if needed:

Retirement Income Planning Document Checklist   Page 3

The documents listed will help us tailor a Social Security claiming plan for you. Couples:
Please bring documents for individual and joint accounts.

Contact us with any questions: Anthony Cingire 201-556-4598, Bruce Linger 201-556-4564

Account statements *Please bring recent statements for all:*

- ☐ Checking and Savings accounts
- ☐ Brokerage accounts
- ☐ Mutual funds
- ☐ Annuities
- ☐ Employee stock purchase plans
- ☐ Stock options
- ☐ Real estate
- ☐ Business interests and other investments

Retirement plan & account statements *Please bring recent statements for all:*

- ☐ IRAs and Roth IRAs
- ☐ 401Ks
- ☐ Other (e.g., profit-sharing)
- ☐ Pensions

Loans & Credit Cards *Please bring recent statements – These inform budgeting*

- ☐ Credit cards & other unsecured lines of credit
- ☐ Mortgages
- ☐ Auto, boat, RV, or similar loans
- ☐ Unsecured loans (i.e. personal loans)
- ☐ Business loans
- ☐ Student loans
- ☐ Loans you are guarantor or co-signer
- ☐ Other:

Insurance *Please bring policy information for:*

- ☐ Life insurance
- ☐ Health insurance
- ☐ Disability insurance
- ☐ Long-term-care insurance

Estate Documents & Information

- ☐ Copy of latest Will & any Instructions
- ☐ Trust document
- ☐ Power(s) of Attorney
- ☐ Information about any expected inheritance

Other

- ☐ Most recent tax return
- ☐ Benefit estimate from Social Security Administration
  If a recent Statement is not available, you may wish to use the Estimator at www.ssa.gov/estimator
- ☐ Documentation describing assets owned outside retirement accounts
- ☐ Name and contact information for other advisors, including investment, tax, estate planning.
- ☐ Other: