FREE FINANCIAL PLAN QUESTIONNAIRE- NO OBIGATION

Personal Information

	Client 1	Spouse
Name		
Date of Birth		
Annual Income (used to estimate social security income)		

Retirement Goals

Desired Retirement Age		
Desired Retirement Expenses (After Tax) (Avg. 50k)		

Retirement Assets

401k/ SEP IRA/ Simple IRA (Current Balance)		
Annual Contributions (Include Employer Match)		
IRA's (Current Balance)		
Annual Contributions		
Both IRA (Current Balance)		
Annual Contributions		

Assets -— Taxable Investment Accounts

Cash/Money Market Funds		
Annual Contributions		
Equities/Stocks/Mutual Funds (Current Balance)		
Annual Contributions		

CD's (Current Balance)

Annual Contributions

Fixed Income/Bonds (Current Balance)

Annual Contributions

Annuities (Fixed or Variable)

Annual Contributions

Savings Account

Savings (Current Balance) - Emergency Money

Annual Contributions

Real Estate Investments (Investment Properties)

Value of Properties

Outstanding Loan Amount & Interest Rate

Personal Assets (Primary Residence)

Home Value

Outstanding Loan Amount

Current Interest Rate

How many more years do you plan to live in the house?

Life Insurance

Face Amount

Length of Term or Indicate Whole Life

Disability Insurance

Short-Term Monthly Income

Long-Term Monthly Income

Retirement Income

Do you qualify for a Pension at Retirement?

- Yes
- No

- Yes
- No

Is Yes, what year will it start?

If Yes, how many years will it provide income?

What is the annual income you qualify for?

Does it have COLA (cost of living adjustment)

- Yes
- No

- Yes
- No

Survivor Benefit %

Do you qualify for Social Security now or in the Future?

- Yes
- No

- Yes
- No

If Yes, Estimated Monthly Income at 63 (if unsure, make sure you provide your current annual income)

At Age 66 Do you expect an Inheritance which would dramatically change your Financial Situation in the Future?

- Yes
- No

- Yes
- No

PLEASE RETURN COMPLETED QUESTIONNAIRE TO J.Wigen@IFManagers.com