



Social Security Zoomer™

Personal Information

	Client 1 (C1)			Client 2 (C2)		
Name						
Date of Birth	/	/	Gender <input type="checkbox"/> M <input type="checkbox"/> F	/	/	Gender <input type="checkbox"/> M <input type="checkbox"/> F
Employment Income	\$			\$		
Business Owner	<input type="checkbox"/> Y <input type="checkbox"/> N			<input type="checkbox"/> Y <input type="checkbox"/> N		
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 1			Client 2		
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"/>					

Retirement Income

Description	Owner		Monthly Amount	Yr It Ends or # of Yrs	Check if amount inflates	% Survivor Benefit (Pension Only)
	C1	C2				
	<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

Description	Client 1		Client 2	
	Value	Additions / Yr	Value	Additions / Yr
Total Employer Retirement Plan	\$	\$	\$	\$
Total Traditional IRA	\$	\$	\$	\$
Total Roth IRA	\$	\$	\$	\$
Total Tax-Deferred	\$	\$	\$	\$

Joint Assets	Value	Additions / Yr	Joint Assets	Value	Additions / Yr
Taxable	\$	\$	Tax-Free		

Risk Score

How much financial 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?

Client 1	Client 2

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

	Men			Women		
Age Group	> 64	50-64	< 50	> 64	50-64	< 50
Risk Score	50	54	59	45	48	52

