Retirement Zoomer™

Personal Information

	Client (C)			Co-Client (Co)		
Name						
Date of Birth	/ /	Gender	☐ M ☐ F	/ /	Gender	☐ M ☐ F
Marital Status		State of Residence				

Retirement Living Expenses

Enter two amounts:	After-Tax Amount
Need: day-to-day living expenses (e.g., food, clothes, utilities, etc.)	$
Want: discretionary expenses (e.g., travel, gifts, etc.)	$

Social Security Benefits

	Client			Co-Client		
Are you eligible?	☐ Yes	☐ No	☐ Receiving Now	☐ Yes	☐ No	☐ Receiving Now
Amount of benefit/Age	$		☐ Use Program Estimate	$		☐ Use Program Estimate

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

Description	Owner		Monthly Amount	Starts	Ends	Inflates?	% Survivor (Pension Only)
	C	Co					
	☐	☐	$			☐	%
	☐	☐	$			☐	%
	☐	☐	$			☐	%

Investment Assets

Estimate of overall allocation: Cash _____% Bond _____% Stock _____%

Description	Client		Co-Client	
	Value	Annual Additions	Value	Annual Additions
Total Employer Retirement Plan	$	$	$	$
Assets: 401(k), 403(b) or Other. Your Contribution: ___________% Company Match: ___________% of first ___________%				
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

Centric Wealth Management

Focused on YOU.

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