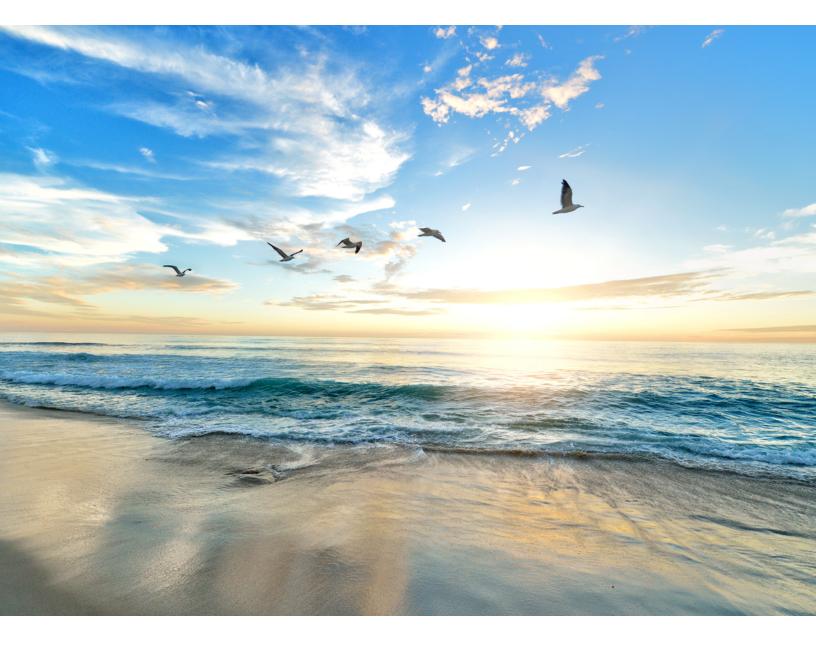
Retirement Lifestyle Plan **Retired**



Personal Information

	Client (C)	Co-Client (Co)
Name		
Gender	Male Female	Male Female
Date of Birth	/ /	/ /
Email Address		
Other Income (non-investment only)	\$	\$
Marital Status	State	of Residence

Important Relationships

Children, grandchildren or any participant included in this plan.

Name	Date of Birth	Relationship
	/ /	
	/ /	
	/ /	

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 - if available, provide your Social Security estimate from ssa.gov.

			Client	Co-Client			
Are you eligible?	Yes	Yes No Receiving Now			No	Receiving Now	
Benefit amount	¢	nsurance	e Amount (PIA)	Primary Insurance Amount (PIA) \$			
When to start		Retiremer	nt Age (per Social Security) at retirement		Retiremei	nt Age (per Social Security) at retirement	

Retirement Income

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

Description	Owner		Monthly	Start	Year It Ends or	% Survivor	Check if amount	GPO
	с	Co	Income	Year	No. of Years	Benefit	inflates	
e.g., ABC Pension			\$ 1,500		End of Life	50%		
			\$					
			\$					
			\$					

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?

Client	Co-Client			

© 2018 PIEtech®, Inc. All rights reserved. MGP_8011