



# Social Security Zoomer™

## Personal Information

	Client (C)				Co-Client (Co)			
Name								
Date of Birth	/	/	Gender	<input type="checkbox"/> M <input type="checkbox"/> F	/	/	Gender	<input type="checkbox"/> M <input type="checkbox"/> F
Employment Income	\$				\$			
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			Co-Client		
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"/> Yes		

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

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

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

