



INVESTMENT ADVISORY | WEALTH MANAGEMENT | INSURANCE

At WWK, we realize that your time is valuable. Completing the questionnaire ahead of time allows you to spend sufficient time answering a vast array of factors critical in planning for your retirement. Without it, questions often go unanswered because information is not only available. Additionally, we are able to spend ample time to conduct research and analysis, avoiding gaps in planning. We are then able to spend more face-to-face time reviewing our findings and recommendations. Keep in mind, there are no costs for this evaluation service, nor are you under any obligation. As always, all information is strictly confidential

Confidential Client Questionnaire

PERSONAL INFORMATION

Name			CHILDREN	DATE OF BIRTH
Address				
City	State	Zip		
Home Phone				
Year In Which You Began Investing				
CLIENT			SPOUSE	
Date of Birth				
Social Security #				
Driver's License #				
Work Phone				
Mobile Phone				
E-mail Address				
Employer				
Address				
City / State / Zip				
Occupation				
Expected Retirement Date				
Current Earned Income				
Rental Income				
Other				
Estimated Ongoing Investments (annually)				
Estimated Anticipated Employer Match(annually)				

RETIREMENT INCOME & RISK TOLERANCE

Estimated after-tax monthly income you will need to assure a comfortable retirement (in today's dollars)		\$ <input type="text"/>		
SOCIAL SECURITY Please refer to your annual Social Security Statement. You can also estimate your benefits on the Social Security website, www.ssa.gov/oact/quickcalc .	\$ <input type="text"/>	START AGE <input type="text"/>	\$ <input type="text"/>	START AGE <input type="text"/>
	PENSION Pensions paid in a lump sum should be entered on the Assets Page under "Retirement Assets."	\$ <input type="text"/>	START AGE <input type="text"/>	\$ <input type="text"/>
	PAYMENT TYPE: <input type="checkbox"/> Life Annuity <input type="checkbox"/> 5-Year Certain & Continuous <input type="checkbox"/> 10-Year Certain & Continuous <input type="checkbox"/> 15-Year Certain & Continuous	<input type="checkbox"/> 50% Joint & Survivor <input type="checkbox"/> 75% Joint & Survivor <input type="checkbox"/> 100% Joint & Survivor	PAYMENT TYPE: <input type="checkbox"/> Life Annuity <input type="checkbox"/> 5-Year Certain & Continuous <input type="checkbox"/> 10-Year Certain & Continuous <input type="checkbox"/> 15-Year Certain & Continuous	<input type="checkbox"/> 50% Joint & Survivor <input type="checkbox"/> 75% Joint & Survivor <input type="checkbox"/> 100% Joint & Survivor
PART-TIME WORK	\$ <input type="text"/>		\$ <input type="text"/>	

RISK TOLERANCE

More Risk

Less Risk

PLEASE SELECT ONE:

N/A Speculative– Owning large holdings in individual stocks, options or other individual securities. Greatest chance for large losses.

High Growth– Opportunity to significantly exceed inflation with a diversified portfolio. High chance of short-term declines.

Moderate Growth– Opportunity to moderately exceed inflation with a diversified portfolio. Moderate chance of short-term declines.

Balanced – Opportunity to exceed inflation with a diversified portfolio of stocks and bonds. Still a chance of smaller short-term declines.

Conservative– Opportunity to slightly outpace inflation with a diversified portfolio of stocks and bonds. Losses less frequent in occurrence.

Capital Preservation– Opportunity to protect with largest risk being inflationary pressures.

