

# CLIENT SCRIPT

A lot of Americans are nearing retirement and with the market downturns and volatility since 2008, many people's retirement funds have shrunk. Have you re-assessed where you are now and how you can still retire in comfort? There are a lot of factors to consider: rising inflation, extended life expectancy, increasing health care costs, and the uncertainty of Social Security. Additionally, have you considered how much your desired standard of living will cost you?

I have good news. I can help you with a plan that will make sure you don't outlive your money and sustain your desired standard of living. You deserve comfort and security in your retirement, especially after having worked so long for what you have. I can even help you pass on more to your heirs.

With my exclusive Retirement Analyzer tool we can address the costs of retirement along with reaching your lifelong goals.

Let's start with the following questions:

- At what age would you like to retire?
- What are your goals for retirement?
- How much monthly income do you think you need to live comfortably?
- Would you like to create a legacy and pass on some money to your heirs?

Now let's fill out this questionnaire to make sure we aren't missing any crucial areas of planning your retirement.

Providing for how you live out the rest of your life doesn't have to be scary. With my tools and some thoughtful planning, we can make sure your needs are met and you never outlive your money.

## RETIREMENT ANALYZER

# RETIREMENT QUESTIONNAIRE

Client Name \_\_\_\_\_ Age/Date of Birth \_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_

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**GOALS (circle all that apply)**

Lifetime Income    Safety    Tax Deferral    Death Benefit  
 Growth    Inflation Protection

Current Monthly Income \$ \_\_\_\_\_

Current Monthly Expenses \$ \_\_\_\_\_

Pension Plan	\$
Social Security	\$
Investments	\$
Part-time Employment	\$
Other	\$

Mortgage/Rent	\$
Insurance/Real Estate Taxes	\$
Utilities	\$
Groceries	\$
Auto Payments/Insurance	\$
Health Insurance	\$
Prescriptions/Co-Pays	\$
Clothing	\$
Other Expenses	\$

Projected Needed Monthly Income \$ \_\_\_\_\_ Age Retirement Income to begin \_\_\_\_\_

Joint Income: Yes / No

Amount of Assets to Invest \$ \_\_\_\_\_ Non-Qualified      \$ \_\_\_\_\_ Qualified

## RETIREMENT ANALYZER