

THE REIN GROUP LLC

Client 1:

Name: _____ Date of Birth: _____
 Retirement Age: _____ Projected Life Expectancy: _____ Phone: (_____) _____ - _____

If Already Elected:
 Current Monthly Benefit Amount: _____ Benefit Start Date: _____

If Pension from non-social security covered earnings:
 Monthly Pension Amount: _____ Pension COLA: _____ Pension Start Date: _____

Social Security benefit at:		Expected Future Earnings:	
Age 62	\$	2013	
Age 66	\$	2014	
Age 70	\$	2015	

Client 2:

Name: _____ Date of Birth: _____
 Retirement Age: _____ Projected Life Expectancy: _____ Phone: (_____) _____ - _____

If Already Elected:
 Current Monthly Benefit Amount: _____ Benefit Start Date: _____

If Pension from non-social security covered earnings:
 Monthly Pension Amount: _____ Pension COLA: _____ Pension Start Date: _____

Social Security benefit at:		Expected Future Earnings:	
Age 62	\$	2013	
Age 66	\$	2014	
Age 70	\$	2015	

Investments and Risk

If the markets were to decline in value early in your retirement, what would you do?

- Not sell, and stay with my long-term plan
- Sell most of my risky investments and buy more conservative ones
- Sell the majority of my portfolio and buy more conservative investments
- Sell my entire portfolio and remain in cash until the market recovers

Based on your tolerance for fluctuations in the market, as well as your overall investment goals, how comfortable are you with risk in your portfolio?

←—————→

Risk is not a concern
 Comfortable with higher risk investments
 Somewhat comfortable with risk
 Prefer moderate risk
 Comfortable with mostly lower risk investments
 Prefer low risk investments

Existing and Potential Sources of Income

Income	Description of Source (Include start and end dates)	Monthly Income	
		You	Spouse/Partner
Annual Income		\$	\$
Social Security		\$	\$
Pension Plans		\$	\$
Annuity Income		\$	\$
Rental Income		\$	\$
Other		\$	\$
Total Monthly Income		\$	\$

Assets	Where Assets are Held	% Stocks	% Bonds	% Short-Term Securities	Annual Contributions		Invested Assets	
					You	Employer	You	Spouse/Partner
Employer Sponsored Plans [401(k), 403(b), SEP, etc.]								
Traditional/Roll-over IRA's, Roth IRA's								
Other Investment Accounts								
Annuities								
Savings & Checking accounts								
Other								

Monthly Income Today: \$ _____
 Monthly Expenses Today: \$ _____

Monthly Income in Retirement (expected): \$ _____
 Monthly Expenses in Retirement (expected): \$ _____

What will cause the changes?

Is there anything else you think we should take into account?