



Retirement Questionnaire

1. What is your biggest financial need in retirement? _____

2. How much income do you need monthly in retirement? _____

3. What age do you need to file for Social Security to maximize your benefits? _____

4. At what age will you run out of money? _____

5. What is your plan to guarantee you will never run out of money? _____

6. What inflation rate are you using to increase your future income? _____

7. What will happen to your income as taxes continue to increase? _____

8. What is your plan to deal with a medical catastrophe? _____

9. How much money did you lose in the 2008 market crash? _____

10. How long did it take to recover the money you lost in 2008? _____

11. When another market crash happens again, how much income will you lose? _____

12. Do you have a written income plan for retirement? (check one) YES ___ NO ___

13. Who helps you make your financial decisions?

Financial Advisor _____ Family Member _____

CPA _____ Attorney _____

