



Writing Agent Email:		Agent Name:		
WEALTH INVESTIGATOR				
First Name:	Last Name:	Email:		Phone Number:
How young are you currently?:	Married, Single, Divorced? :	<i>If Married, Please respond what is their?</i>	Name:	Age:
Are you working or retired?:	Anyone else that helps with making financial decisions?	Desired retirement age:	What State you live in?:	What is your monthly income currently?:
Have you started taking social security yet? YES [] NO []	<i>If so, how much are you getting?:</i>		<i>If not, when do you plan on taking it?:</i>	
Have you gone on ssa.gov to check how much you'll be getting at that time?	If so, how much will your ss income be at that time?:			
What are your total monthly expenses?:		What is your health like currently?:		
How much do you have in your current 401(k), 403B, IRA?	How much do you have in your old 401(k), 403B, IRA?	How much do you have in Roth IRA?	How much do you have cash/savings/CD?	
Is there any money sitting anywhere else?	<i>If so, where is it, and how much?</i>		Do you have any specific concerns you'd like to discuss?	
What would your ideal retired life look like?		If I could wave a magic wand with the retirement money you currently have, what would your ideal outcome for the money be?		
Are you working with an advisor? YES [] NO []				
----- Signature		----- Date (mm/dd/yyyy)		