

# RETIREMENT PLANNING QUESTIONNAIRE



**LEVEL FOUR**  
Financial  
A DIVISION OF  
LEVEL FOUR GROUP, LLC

Prepared For: \_\_\_\_\_

Date: \_\_\_\_\_

## RETIREMENT SCENARIOS

|                            | Minimum | Requested | Stretch |
|----------------------------|---------|-----------|---------|
| Annual Retirement Spending | \$      | \$        | \$      |

## SAVINGS WHILE EMPLOYED

|                              | Minimum | Requested | Stretch |
|------------------------------|---------|-----------|---------|
| Annual Tax Advantaged Saving | \$      | \$        | \$      |

|                        | Minimum | Requested | Stretch |
|------------------------|---------|-----------|---------|
| Annual Taxable Savings | \$      | \$        | \$      |

## AVERAGE ANNUAL PORTFOLIO PERFORMANCE EXPECTATION

|                                                | Minimum | Requested | Stretch |
|------------------------------------------------|---------|-----------|---------|
| Tax Advantaged Average Expected Rate of Return | %       | %         | %       |

|                                         | Minimum | Requested | Stretch |
|-----------------------------------------|---------|-----------|---------|
| Taxable Average Expected Rate of Return | %       | %         | %       |

## LEGACY GOALS

|                    | Minimum | Requested | Stretch |
|--------------------|---------|-----------|---------|
| Family Inheritance | \$      | \$        | \$      |

|                 | Minimum | Requested | Stretch |
|-----------------|---------|-----------|---------|
| College Funding | \$      | \$        | \$      |

|                   | Minimum | Requested | Stretch |
|-------------------|---------|-----------|---------|
| Charitable Giving | \$      | \$        | \$      |

866.834.1040 | [WWW.LEVELFOURFINANCIAL.COM](http://WWW.LEVELFOURFINANCIAL.COM)

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# RETIREMENT PLANNING QUESTIONNAIRE



## LEVEL FOUR

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### LONG-TERM CARE

| Annual Amount                     | Minimum Target |          | Stated Target                       |          | Highest Cost Target |          |
|-----------------------------------|----------------|----------|-------------------------------------|----------|---------------------|----------|
|                                   | Person 1       | Person 2 | Person 1                            | Person 2 | Person 1            | Person 2 |
|                                   | \$             | \$       | \$                                  | \$       | \$                  | \$       |
| Number of years                   |                |          |                                     |          |                     |          |
| Do you have disability insurance? |                |          | Do you want us to model disability? |          |                     |          |
| Yes No                            |                |          | Yes No                              |          |                     |          |

### RETIREMENT PURCHASE GOALS

| Type | Amount | Financing? |    | Annual Amount | Start Year | Stop Year |
|------|--------|------------|----|---------------|------------|-----------|
|      | \$     | Yes        | No | \$            |            |           |
|      | \$     | Yes        | No | \$            |            |           |
|      | \$     | Yes        | No | \$            |            |           |
|      | \$     | Yes        | No | \$            |            |           |

### FINAL EXPENSES

|          |    |
|----------|----|
| Person 1 | \$ |
| Person 2 | \$ |

### ESTATE TAX

|                                                                                      |                                 |
|--------------------------------------------------------------------------------------|---------------------------------|
| 1) Is the future estate likely to stay within State & Federal Estate Tax exemptions? | 2) If No, how will tax be paid? |
| Yes No                                                                               |                                 |

### ADDITIONAL CONSIDERATIONS

|  |
|--|
|  |
|--|

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