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	$	$	$
☐ Annual Taxable Savings	$	$	$

AVERAGE ANNUAL PORTFOLIO PERFORMANCE EXPECTATION

	Minimum	Requested	Stretch
☐ Tax Advantaged Average Expected Rate of Return	%	%	%
☐ Taxable Average Expected Rate of Return	%	%	%

LEGACY GOALS

	Minimum	Requested	Stretch
☐ Family Inheritance	$	$	$
☐ College Funding	$	$	$
☐ Charitable Giving	$	$	$

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LONG-TERM CARE

	Minimum Target		Stated Target		Highest Cost Target	
	Person 1	Person 2	Person 1	Person 2	Person 1	Person 2
Annual Amount	$	$	$	$	$	$
Number of years						

Do you have disability insurance? ☐ Yes ☐ No

Do you want us to model disability? ☐ 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?

☐ Yes ☐ No

2) If No, how will tax be paid?

[redacted]

ADDITIONAL CONSIDERATIONS

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