Personal Retirement Consultants

A few questions, a lot of answers

Our retirement income planning questionnaire helps us create a personalized strategy to assist your financial and retirement planning.

Get lifelong financial and retirement planning support

No matter where you're at in life, our Personal Retirement Consultant (PRC) team is here to offer professional financial planning guidance. They can help you in areas such as:

- Setting goals
- Budgeting
- Saving
- Investing
- Managing debt
- Estimating retirement income
- Planning for major life events

Once your questionnaire is complete, your Nationwide PRC will review it and give you a personal analysis.

Your PRC can help you understand many of the financial details about your retirement income. Our commitment to you is simple: We provide personalized financial services to help you make knowledgeable decisions up to and throughout your retirement. It's an added service at no additional charge, and it's our way of helping you take the next step in your journey.

Please review the questionnaire and gather the requested data. If you have any questions or require assistance, call your PRC.

Tell us about your retirement goals.

Tell us about what you want to do in retirement.

Check all that apply to you and/or your spouse.

- ◯ Travel
- ◯ Recreation
- ◯ Go back to school
- ◯ Work part time (teach, consult, etc.)
- ◯ Volunteer/community service
- ◯ Relocate
- ◯ Start a new business
- ◯ Pursue hobbies
- ◯ Help with grandchildren's education
- ◯ Give to charity

Tell us about your concerns and questions.

Tell us what concerns you most.

Mark 3 or 4 questions from the list below. Your responses will help your PRC prepare for your meeting. Of course, your PRC will discuss any relevant questions you have, even if they're not listed here.

- Will I have enough money to do the things I want to do?
- Will I have enough money to maintain my current standard of living?
- Will I be able to afford health care?
- How can I make sure that my money lasts as long as I do?
- How can I catch up quickly on my retirement savings?
- What is the best way for me to take my pension payments?
- Do I need to take out my deferred compensation?
- My spouse has a pension/retirement plan; how should we take the money from it?
- What assets should I begin to draw from first for extra retirement income?
- I have multiple savings and retirement accounts; are there benefits to consolidating them?
- How can I maximize my retirement income?
- Do I have the right investment mix for my/our situation?
- When should I or my spouse begin receiving Social Security benefits?
- I have/my spouse has a serious medical condition; how does this impact our planning?
- What happens if I pass away before my spouse?
- How will my income be taxed in retirement?

How did you hear about the PRC financial planning service? (Check all that apply)

◯ My local Retirement Specialist ◯ Website ◯ Local office
◯ Other: ____________________

Tell us about yourself and your family members.

Tell us about yourself.

First name: ______________________ MI: ______ Last name: ________________________

Address: ____

City: ___________________________ State: _____ ZIP: _____________________

Cellphone: __________________________ Work phone: ___________________________

Email (required): ____

Date of birth: ____________________ Expected retirement date: ______________________

Occupation: ____

Employer: ____

Salary: ____

Do you think you'll work during your retirement years? ◯ Yes ◯ No

If yes, full-time or part-time? ________________ Expected income: $___________________

Tell us about your spouse.

First name: ______________________ MI: ______ Last name: ________________________

Spouse's email (required): ____

Date of birth: ____________________ Expected retirement date: ______________________

Occupation: ____

Employer: ____

Salary: ____

Do you think your spouse will work during their retirement years? ◯ Yes ◯ No

If yes, full-time or part-time? ________________ Expected income: ____________________

Tell us about your children/dependents.

Name: ____________________ Relationship: ___________ Date of birth: ________________

Name: ____________________ Relationship: ___________ Date of birth: ________________

Name: ____________________ Relationship: ___________ Date of birth: ________________

Name: ____________________ Relationship: ___________ Date of birth: ________________

Name: ____________________ Relationship: ___________ Date of birth: ________________

Name: ____________________ Relationship: ___________ Date of birth: ________________

Tell us about your income.

Pension benefits

Description	Recipient	Annual amount	Start date/age	% payable to spouse at death	Annual COLA %

Social Security benefits

Your Social Security Annual Benefit Statement can be accessed online at ssa.gov.

You	Monthly amount at **full retirement**	Expected start date/age	**Spouse**	Monthly amount at **full retirement**	Expected start date/age
Social Security:			Social Security:		

Retirement: 457(b), 401(a), 401(k), IRA, Roth IRA, other

Please include a copy of your latest statement, if possible.

Plan type/name	Owner (you/spouse)	Current value	Current contribution amt.	Employer match? (%)

Bank, savings and investment accounts

If you maintain more accounts than will fit in this space, please attach a listing of those accounts on a separate page. Please also include a copy of your latest statement for each account.

Account type/name	Owner (you/spouse/joint)	Current value	Current contribution amt.

Do you have life insurance? ◯ Yes ◯ No

If yes, how much survivor benefit: $_____________ and monthly premium: $________________

If Term, when does the term end? (Year) _____________

If Permanent, what is the cash value? $_____________

Do you have a will or trust in place? ◯ Yes ◯ No

Date of last update:_____________

Does your spouse have life insurance? ◯ Yes ◯ No

If yes, how much survivor benefit: $_____________ and annual premium: $__________________

If Term, when does the term end? (Year) _____________

If Permanent, what is the cash value? $_____________

Do you have long-term care insurance? ◯ Yes ◯ No

If yes, what is the monthly benefit: $________________ and monthly premium: $________________

Does your spouse have long-term care insurance? ◯ Yes ◯ No

If yes, what is the monthly premium: $________________

Tell us about your assets and debts.

Include assets that have a material impact on your net worth (primary, secondary and/or rental property; personal and business assets; etc.).

Housing ◯ Own ◯ Rent (select one) Rent: $__________ monthly expense

Own

Description	Purchase price	Current value	Annual taxes	Annual insurance	Annual maintenance/HOA

Mortgage

Property description	Balance owed	Interest rate	Date paid off	Monthly payment	Principal and interest

Do you own income-producing property? ◯ Yes ◯ No

If yes, monthly rental income: $__________

Debts

Include debts such as vehicle loans, student loans, credit cards, alimony, child support, etc.

Description	Current balance	Monthly payment	Annual interest rate

Tell us about your expenses.

Potential expense sources	Current monthly expenses	Anticipated monthly expenses in retirement
Utilities, including cellphone and streaming services		
Household (furnishings/supplies)		
Transportation (gas, maintenance, registration)		
Car insurance		
Food at home		
Meals out		
Entertainment (recreation, hobbies, etc.)		
Travel		
Clothing		
Personal care (products and services)		
Health care premiums		
Medical/dental/vision out of pocket		
Professional expenses		
Charitable giving		
Child(ren) expenses		
Gifts		
Other (pets, hobbies, etc.)		

Major events and/or expenses

For planning purposes, please indicate any major events expected below (e.g., wedding, tuition, major celebrations, down payment for home or other large purchase).

Event ____________________ Year __________ Est. cost __________

Event ____________________ Year __________ Est. cost __________

Event ____________________ Year __________ Est. cost __________

Please return your information

Name Sherri Panttaja

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Phone number ____

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