



EMERGING WEALTH

Investment Management, Inc.[®]

_____, 20____

RETIREMENT PROJECTION

DATA QUESTIONNAIRE

FOR

5700 Corporate Drive, Suite 360 Pittsburgh, PA 15237-5829 Phone: (866) 280-4896, Ext. 2 Fax: (412) 635-9213

Registered Investment Advisor

RETIREMENT PROJECTION QUESTIONNAIRE

Personal Information

	Client	Co-Client
Name		
Birthdate		
Income		
State of Residence		

Children/Grandchildren/Other Dependents

Name	Birthdate	Relationship

Retirement Assumptions

	Client	Co-Client
Retirement Age		
Current Living Expenses*		
Estimated Retirement Living Expenses*		

*All Living Expenses Should Be After Tax And In Today's Dollars.

Goals

(Examples Include Education, Travel, Home Improvement, Wedding, Care, Etc.)

Goal	Start Year	Cost	How Often	Number of Occurrences
(i.e. Daughter's Wedding)	2017	\$35,000	1 Time	1 Time

Social Security

	Client	Co-Client
Age To Start Benefits*		
Benefit Amount (From statement)*		

*If You Are Unable To Answer The Above Questions, We Will Use The Program Estimates.

Retirement Income

(Examples Include Pension, Part-Time Work, Annuities, Rental Income, Etc.)

Income Source	Income Owner	Amount	Starts	Ends	Inflation?
(i.e. Pension)	Client	\$35,000	Retirement	Death	None

Investment Assets

Description	Client		Co-Client	
	Value	Annual Additions	Value	Annual Additions
Employer Retirement Plan(s)				
Total Traditional IRA(s)				
Total Roth IRA(s)				
Total Other Tax-Deferred				

Description	Client		Co-Client	
	Value	Annual Additions	Value	Annual Additions
Total Taxable Assets				

Notes
