Legend Financial Advisors, Inc.®

_____________________, 20____

RETIREMENT PROJECTION

DATA QUESITONNAIRE

FOR

____

5700 Corporate Drive, Suite 350 Pittsburgh, PA 15237 Phone: (412) 635-9210 Fax: (412) 635-9213

www.legend-financial.com Registered Investment Advisors E-mail: legend@legend-financial.com

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