



Please fill out and fax to 303-694-9185. You may also save the form and email it to

JAvery@PresidentialBrokerage.com

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 5445 DTC Parkway
 Suite 1100
 Greenwood Village
 CO 80111

303-694-1600

Please rank your major concerns from 1 to 10:

Outliving Your Savings in Retirement:

Inflation:

Political Risk:

Poor Performance of Investments:

Leaving a Legacy:

Other Concerns:

Name:

Date of Birth:

Spouse:

Date of Birth:

Address:

Phone Numbers

Home

Work

Cell

Email

In Today's dollars, how much will you require for retirement living expenses?

At what age do you plan to retire?

Current Marginal Tax Rate?

At what age does your spouse plan to retire?

Marginal Rate in Retirement?

What is your current projected full Social Security retirement benefit?

What is your spouse's current projected full Social Security retirement benefit?

At what age do you plan on taking SS? Spouse's age for taking SS?

Other sources of Income (Pensions, Rental Property Income, etc

Source	Amount	COLA (y/n)
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<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>
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Annual Contributions to 401k's and IRA's	Yourself	<input type="text"/>
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Annual Contributions to 401k's and IRA's	Spouse	<input type="text"/>
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Annual Contributions to Roth IRA's	Yourself	<input type="text"/>
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Annual Contributions to Roth IRA's	Spouse	<input type="text"/>
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Retirement Assets

	Yourself	Spouse	Joint
401k and other Employer Sponsored Plan Balances	<input type="text"/>	<input type="text"/>	
Traditional IRA Balances	<input type="text"/>	<input type="text"/>	
Roth IRA Balances	<input type="text"/>	<input type="text"/>	
Taxable Savings and Investments	<input type="text"/>	<input type="text"/>	<input type="text"/>
Life Insurance Cash Value	<input type="text"/>	<input type="text"/>	<input type="text"/>
Annuities	<input type="text"/>	<input type="text"/>	<input type="text"/>
Future Inheritance	<input type="text"/>	<input type="text"/>	<input type="text"/>