



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

jmcbride@PresidentialBrokerage.com

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Presidential Brokerage
 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 spouses' 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)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Annual Contributions to 401k's and IRA's Yourself

Annual Contributions to 401k's and IRA's Spouse

Annual Contributions to Roth IRA's Yourself

Annual Contributions to Roth IRA's Spouse

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"/>