

Free Retirement Issues Assessment

This assessment and the resulting recommendation report are a free service. You have no obligation to us – hidden or otherwise – in filling out the information and receiving the resulting recommendations. This is part of our commitment to serving the local community. There are only 23 "Yes" or "No" responses required and it should take you less than 8 minutes to complete it.

Once you have completed the assessment and submitted it, we will generate the recommendation report which consists of identifying important retirement issues that may arise in the future or that may require immediate attention. The report you receive will also provide numerous recommendations or strategies you can pursue to correct the retirement issues you currently face or will face. It is important you give us accurate contact information so that we can arrange to get this report into your hands either through email or surface mail or any other means you choose.

Name of Planner: Thomas Day

Personal and Contact Information (Click here to Open)

*Your full name

William Savage

*Your age

67

Full name of your spouse (If there is a spouse)

Fidelity Savage

Age of spouse (If there is a spouse)

67

*Your email

william@email.com

*Your phone number

(555) 888-9999

Street address

anywhere

Residence city

Bargeron

Residence state

Oregon

*** (Indicates a required entry)**

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Retirement Planning Survey (Click here to Open)

Q1. If you are NOT currently retired, do you anticipate retiring within the next 10 years or less?

You

☒ Yes

☐ No

Spouse

☒ Yes

☐ No

Q2. If you ARE currently retired are you still employed?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q3. Do you currently own (hold title to) the dwelling where you live?

You

☒ Yes

☐ No

Spouse

☐ Yes

☐ No

Q4. Are you planning on downsizing to a new home in your same area or another location?

You

☒ Yes

☐ No

Spouse

☒ Yes

☐ No

Q5. Are you seeking a new lifestyle by living in a more exciting location in your retirement?

You

☒ Yes

☐ No

Spouse

☐ Yes

☐ No

Q6. If you are not receiving Social Security do you plan on taking it as soon as you are eligible?

You

☒ Yes

☐ No

Spouse

☒ Yes

☐ No

Q7. Are you prepared to deal with your own disability issues or the disability of your spouse during retirement?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q8. If you are NOT retired do you have access to a retirement savings plan?

You

☒ Yes

☐ No

Spouse

☒ Yes

☐ No

Q9. If NOT retired and you have a retirement savings plan are you taking full advantage of that plan?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q10. If you ARE retired and have an existing retirement savings plan are you satisfied with your earnings?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q11. If you are NOT retired and you have a retirement savings, do you understand the income options under the plan?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q12. If you ARE retired and have retirement savings and draw out income will those savings last as long as you live?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q13. Do you currently have tax qualified savings such as 401(k), IRA, deferred annuity or 403 (b) (TSA)?

You

☒ Yes

☐ No

Spouse

☐ Yes

☒ No

Q14. Are you currently enrolled in Medicare?

You

☒ Yes

☐ No

Spouse

☐ Yes

☐ No

Q15. Do you have a plan for dealing with health costs not covered by Medicare in your retirement?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q16. Do you feel you have done an adequate job with your estate planning?

You

☒ Yes

☐ No

Spouse

☐ Yes

☒ No

Q17. Do you currently have a will and/or a trust?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q18. Have you made arrangements if you become unable to make your own decisions?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q19. Have you planned for your death or the death of your spouse in providing continued income for the survivor?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q20. Do you currently have funding for burial and/or to replace income from the death of a spouse?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q21. Do you understand Medicaid impoverishment rules and how they might take away all of your assets?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q22. Have you implemented any strategies to protect your assets from Medicaid seizing them?

You

☐ Yes

☒ No

Spouse

☐ Yes

☒ No

Q23. Are you or a living spouse or a deceased spouse a veteran of the military service?

You

☒ Yes

☐ No

Spouse

☐ Yes

☒ No

☒ I'm not a robot



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