FINANCIAL PLANNING QUESTIONNAIRE

It's as easy as 1, 2, 3.

1. Complete the financial planning questionnaire and return to our office with any applicable retirement statements.
2. We create a custom plan to review with you.
3. Make changes as needed and review periodically.

BLUEWAY
FINANCIAL PARTNERS
OF
RAYMOND JAMES®

PERSONAL INFORMATION

Your Name:_________________________________ Spouse Name:_________________________________
Date of Birth: _______________________________ Date of Birth:_______________________________
Company:____________________________________ Company:_____________________________________
Occupation:__________________________________ Occupation:__________________________________
Current Income: ______________________________ Current Income:______________________________
Phone: ______________________________________ Phone:______________________________________
Email: _______________________________________ Email:_______________________________________
Address: ____
Children? ☐ Yes ☐ No Ages:____
Preferred Contact Method: ☐ Email ☐ Phone
Preferred Financial Advisor: ☐ Jeff Vander Weele ☐ Melissa Stewart ☐ No Preference

DESIRED RETIREMENT AGE

What age would you *like* to retire? _______ What age is acceptable? ________
What age would your spouse *like* to retire? ________ What age is acceptable? ________
I am unsure ☐

WORK IN RETIREMENT

What will you do all day when you no longer have to work? Many people choose to work the job they always wanted to. Others may choose to stay in their line of work, but on a consulting basis.

Do you see yourself working in retirement? ☐ Yes ☐ No
If Yes – how many years? __________ Expected Income? ____________________
Does your spouse plan to work in retirement? ☐ Yes ☐ No
If Yes – how many years? __________ Expected Income? ____________________

SOCIAL SECURITY BENEFITS

To estimate your social security benefit please go to www.ssa.gov/retire/estimator.html . Please provide your "Full" social security benefit below (Full Retirement Age is 67 if you were born after 1960).

What is your monthly benefit at Full Retirement Age? __________________
What is your spouse's monthly benefit at Full Retirement Age? ________________
Have you been married 10+ years and then divorced? ☐ Yes ☐ No
Are you a widow? ☐ Yes ☐ No

DESIRED INCOME IN RETIREMENT

Rule of thumb: People typically want 70-80 percent of their current income to support their lifestyle in retirement.

What is your desired after-tax income in retirement? _____________________________
I am unsure. ☐

ASSETS

Please provide statements for the below referenced accounts so we may use your current investment allocation to project future account values.

Your Retirement Savings:

Description	Balance	Annual Contribution	Employer Contribution
Ex. XYZ Investments 403(b)	*$10,000*	*$200*	*$50*
1. ____________________	__________	__________________	____________________
2. ____________________	__________	__________________	____________________
3. ____________________	__________	__________________	____________________

Spouse Retirement Savings:

Description	Balance	Annual Contribution	Employer Contribution
1. ____________________	__________	__________________	____________________
2. ____________________	__________	__________________	____________________
3. ____________________	__________	__________________	____________________

Investment Assets and Savings:

Description	Balance	Annual Addition (if any)
1. ____________________	__________	__________________
2. ____________________	__________	__________________
3. ____________________	__________	__________________

Other Assets (home, business, investment properties, etc.):

Description	Owner	Current Value
1. ____________________	__________	__________________
2. ____________________	__________	__________________
3. ____________________	__________	__________________

Do you have at least 3-6 months of household expenses set aside to help cover a “rainy day” or emergency?

☐ Yes ☐ No

Do you expect an inheritance? ☐ Yes ☐ No

If yes, approx. year? _______________ Expected value: _________________

DEBT

Please list the amount owed, payment, and interest rate on your current debt.

Description	Balance	Payment	Interest Rate
Ex. XYZ Mortgage Co.	*$100,000*	*$800/month*	*4.5%*
Mortgage	____________	_________________	______________
Home Equity LOC	____________	_________________	______________
Auto Loan(s)	____________	_________________	______________
Credit Card(s)	____________	_________________	______________
Student Loan:	____________	_________________	______________

Other Liabilities

____

____

____

OTHER FINANCIAL PLANNING CONSIDERATIONS

Risk Tolerance:
On a scale of 1 to 100 (1=lowest, 100=highest), how would you rate your willingness to take risk with your investments?

You___________ Spouse___________

Do you have a will? ☐ Yes ☐ No When was it last updated (approx. year)? ___________
Do you have a trust? ☐ Yes ☐ No When was it last amended (approx. year)? __________

Would you like information on saving for college for children or grandchildren? ☐ Yes ☐ No

Do you have life insurance? ☐ Yes ☐ No If yes, how much? _______________
Does your spouse have life insurance? ☐ Yes ☐ No If yes, how much? _______________

While retirement may be several years away for you, are there any questions or concerns we can help you with now? Is there anything else we should know or other financial concerns you would like us to address?

____
____
____
____
____
____
____

Please return your completed questionnaire and applicable account statements to our office via email, fax or regular mail.

Email: blueway@raymondjames.com
Fax: 616.974.3366
Mail: 2060 East Paris Ave SE Suite 250, Grand Rapids, MI 49546

We will create your custom report and contact you to schedule a review.

Have questions? Feel free to give our office a call at 616.974.3003.

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