PREPARING FOR RETIREMENT

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At Guy Rodgers Private Wealth Strategies, we strive to understand what is important to you and your family in order to help you prepare for and work toward your financial goals. We then work with you to create and implement strategies that can help you achieve those goals. Together, we have identified one of your primary needs as preparing for retirement. The first step in creating your customized strategy for this need is to turn it into a specific and attainable goal.

To help us get started, please provide the following information:

Prospective Client Information:

CLIENT NAME ____________________ **DOB** ____________

CO-CLIENT NAME ____________________ **DOB** ____________

Where are You Today, and Where Would You Like to Be?	You	Co-Client
1. How much do you estimate you will earn this year before tax? (Earned income means wages, tips, etc.)	$____________	$____________
2. At what age do you want to retire?	____________ AGE	____________ AGE
3. How much do you want to spend during retirement? (This is an estimate of your after-tax spending.)	$____________ x23 = $____________	
4. If you currently receive or expect to receive a pension, how much does it provide/do you expect it to provide per month?	$____________	$____________
5. How much do you currently receive, or how much do you expect to receive, in Social Security benefits per month? (If you don't know, we can estimate this for you.)	$____________	$____________
	Current Savings	**Monthly Contributions**
6. How much have you currently saved for retirement, and how much do you add to your savings each month?	$____________	$____________
Taxable (This excludes employer retirement plans and IRAs.)	$____________	$____________
Tax-Free (This includes Roth IRAs and Roth 401(k)s.)	$____________	$____________
Tax-Deferred (This includes traditional IRAs and employer retirement plans such as 401(k)s.)	$____________	$____________

Guy Keith Rodgers - LPL Financial Advisor
1105 Alexis Ct., Suite 103
Mansfield, TX 76063

P: 817-225-4805 | **M:** 817-366-6418 | **F:** 817-225-4804
guy@grpws.com | www.grpws.com

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