REINHART
FINANCIAL GROUP

FINANCIAL PLANNING QUESTIONNAIRE

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PLANNING QUESTIONNAIRE FOR:
IN-RETIREMENT ADDENDUM

DOCUMENTS

• TAX FORMS

- ☐ Most recent Tax return
- ☐ Most recent W-2 form

• FINANCIAL

- ☐ Most recent copies of any investment accounts, or any other financial assets
- ☐ Information regarding any investment properties you have an interest in
- ☐ Most recent copies of all savings / checking accounts
- ☐ Most recent copies of Social Security (or comparable) retirement benefits. If unavailable, please notify us and ask for guidance regarding where to find this information.
- ☐ Spreadsheet that details all substantial debt or liabilities, including mortgage debt
  - Please include interest rate and margin of interest if the debt is variable
  - Are the student loans private? Federal? Please note on spreadsheet

• OTHER / MISC

- ☐ Copy of your budget (best average monthly estimate, itemized if possible/applicable)
- ☐ Copy of employer benefits booklet that details life, health, disability, and 401k benefits
- ☐ If you have a will, living trust, or power of attorney please provide a copy of those documents
- ☐ If you are eligible to participate in an employer 401(k) or Pension Program, please provide as much detail as possible; please see examples of such below
  - 401(k)/403(b): Employer Matching formula | Profit Sharing formula | Roth availability
  - Pension Program: Options for timing and structure of payments | Cost of Living Adjustments | Medical Benefits

• SPECIFIC INFORMATION

Income Spouse 1: $____________________ **Net Worth** Total: $_____________________

Investable: $_________________

QUESTIONNAIRE | RETIREMENT

- Please list all current sources of income, aside from distributions from investment accounts (including IRA RMDs)

TYPE OF INCOME	AMOUNT + FREQUENCY
___________________________________	_____________________ / ________
___________________________________	_____________________ / ________
___________________________________	_____________________ / ________
___________________________________	_____________________ / ________
___________________________________	_____________________ / ________
___________________________________	_____________________ / ________

- Please describe any short-term financial commitments that we should be aware of (0-5 years)

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- Do you expect your income need to increase or decrease as you move further along in retirement? By how much and when?

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- Are you planning on leaving assets to your heirs? If so, will this come in the form of a home, dollars, or another type of asset?

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- Are you expecting to stay in your current residence indefinitely? If you plan to have multiple residences or change residences in retirement, please describe in detail.

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- How have you obtained health insurance coverage in retirement? If this is through a means other than Medicare and Medicare supplement, please provide details, and provide your ability retain this coverage after age 65.

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QUESTIONNAIRE | INSURANCE / LIABILITIES

- Please describe the life insurance currently in-force (provide documentation on any non-employer, private policies in place)

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- Do you have a desire to leave assets to an heir? If so, how much, and in what form (property, cash, etc)

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- Please describe any current liabilities that you would want eliminated at your passing.

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Please list any Long Term Care insurances in place. (Please provide documentation as well)

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