

## Intake Sheet

## 1 HOUSEHOLD

Client name  Spouse name

Client current age  Spouse current age  State of residence

Phone  Email

## 2 RETIREMENT TIMING

Client planned retirement age  Spouse planned retirement age

## 3 ASSETS &amp; TAX STATUS

| Account type               | Tax status               | Owner (client / spouse / joint) | Current balance (\$) |
|----------------------------|--------------------------|---------------------------------|----------------------|
| 401(k) / 403(b) / 457      | Tax-deferred (qualified) | <input type="text"/>            | <input type="text"/> |
| Traditional / rollover IRA | Tax-deferred (qualified) | <input type="text"/>            | <input type="text"/> |
| Roth IRA / Roth 401(k)     | Tax-free (qualified)     | <input type="text"/>            | <input type="text"/> |
| Brokerage account          | Taxable                  | <input type="text"/>            | <input type="text"/> |
| Bank savings / CDs         | Taxable                  | <input type="text"/>            | <input type="text"/> |
| Annuities                  | Tax-deferred             | <input type="text"/>            | <input type="text"/> |
| Life insurance cash value  | Tax-advantaged           | <input type="text"/>            | <input type="text"/> |
| Other                      |                          | <input type="text"/>            | <input type="text"/> |

Total investable assets \$  Percentage tax-deferred / qualified  %

## 4 RETIREMENT INCOME NEED

Annual income needed in retirement, gross of tax \$

Income to begin at age  Duration of income (years)  or to age

Expected Social Security / pension per year \$

## 5 PRIORITIES &amp; NOTES

Top concern (fees, taxes, market risk, income, legacy, other)

Fillable form: type directly into the fields, or print and complete by hand. Return to **Michael Zingale**, Advanced Group · 312-882-8717 · mzingale@advanced-corp.com · 55 East Monroe Street, Chicago, IL 60603