

NORTHWEST ASSET MANAGEMENT

Here is some basic information we will need to assess your situation. Once we have your data, we will contact you (via your preferred method) to confirm your information and get a better feeling of your situation. If you do not want to enter the data online we can set up a time for someone to contact you over the phone. Please free to call us at 1-877-838-3690

PERSONAL INFORMATION:

Client's

Name _____
Date of Birth _____
Address _____

Email _____
Phone _____
Best method of contact? _____

Spouse's

Name _____
Date of Birth _____
Address _____

Email _____
Phone _____

RETIREMENT INFORMATION:

Desired retirement age? _____
Spouses desired retirement age? _____
Desired gross retirement income? \$ _____

LIFE EXPECTANCY:

Do you have a normal life expectancy? ☐ Y ☐ N
Does your spouse have a normal life expectancy? ☐ Y ☐ N

SOURCEs OF INCOME:

Do you or your spouse plan to work in retirement? ☐ Y ☐ N
Do you or your spouse have any pension or annuity income? ☐ Y ☐ N
Do you or your spouse expect an inheritance? ☐ Y ☐ N
Do you or your spouse have any investments to provide income in retirement? ☐ Y ☐ N
Do you or your spouse have life insurance? ☐ Y ☐ N If Yes, ☐ Term ☐ Permanent
Do you have any additional sources of income? ☐ Y ☐ N

Don't forget to provide a copy of your Social Security Statement along with this questionnaire.

You can **email** to: info@thesocialsecutityadvisor.com. You can **fax** it to us at 877-838-3694.

You can **mail** it to us: The Social Security Advisor; 7900 SE 28th St. Suite 412. Mercer Island, WA 98040.

If you have any questions, please so not hesitate to call 1-877-838-3690. We are happy to help in any way we can.

Thank You!