

Your Custom Title

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Title

RETIREMENT SURVEY

Rate Your Retirement Outlook

Let Us Know If You Have Any New Concerns or Needs

Over time, the issues that concern us as investors may change, whether it's because of the current economic outlook or what's happening in our lives. We'd like to see whether you have any unaddressed concerns or needs regarding your financial goals for retirement. Please take a moment to fill out this survey and return it to us in the enclosed envelope.

Have you become more concerned about any of these issues since your last portfolio review? (Check all that apply)

- Having to work longer than originally expected to meet my financial goals for retirement
 - Running out of money in retirement
 - Not being able to afford to send my kids to the colleges of their choosing
 - Paying for health care in retirement
 - My parents' financial situation
 - Losing money in the financial markets
 - The effect of inflation on my retirement income
 - Other _____
-
-

How would you describe your current feelings about investment risk compared with how you felt a year ago?

- More tolerant
- About the same
- Less tolerant
- Not sure

In your opinion, how much of your income will be consumed by taxes when you retire?

- More than today
- About the same
- Less than today
- Don't know

Would you rather have a \$1 million portfolio or a \$50,000 guaranteed annual income for the rest of your life?

- \$1 million portfolio
- \$50,000 guaranteed annual income
- Can't decide

Have you changed jobs recently and still have money in a former employer's retirement plan?

- Yes
- No
- Not sure

How do you think your Social Security benefits will compare to the benefits paid to today's retirees?

- My benefits will be higher.
- My benefits will be about the same.
- My benefits will be lower.
- Not certain what Social Security will provide.

Please place a "1" next to your largest expected source of retirement income, a "2" next to the second largest expected source, and so on, until you have ranked all sources (put a zero next to any sources from which you do not expect to receive income).

- Social Security
- Personal savings and investments
- Employer-sponsored retirement plan [e.g., 401(k), 403(b), and 457 plans]
- Traditional IRA
- Roth IRA
- Pension
- Annuity
- Other: _____

How confident are you that you will be able to live comfortably in retirement?

- Very confident
- Somewhat confident
- Not at all confident

The top two concerns shared by most retirees are taxes and inflation. Which of these concerns you more?

- Taxes
- Inflation
- Both concern me equally

When was the last time you reviewed the beneficiary designations on your retirement accounts?

- Within the past 12 months
- In the past two to four years
- Five years ago or longer
- My retirement accounts have beneficiaries?

Do you have other questions or concerns not addressed here? _____

Name _____

Email _____

Phone _____

Thank you for taking the time to complete this survey.

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