

Please (Circle) the MOST accurate description:

Retirement Portfolio Value	Annual Retirement Income Needed	Years Until Retirement
\$250,000 - \$500,000	\$60,000 (\$5k/month)	Zero (Already Retired)
\$500,000 - \$750,000	\$72,000 (\$6k/month)	< 1
\$750 - \$1M	\$84,000 (\$7k/month)	1 - 2
\$1M - \$2M	\$96,000 (\$8k/month)	3 - 5
\$2M - \$3M	\$108,000 (\$9k/month)	5 - 7
\$3M+\$120,000	\$120,000 (\$10k/month)	7 - 10
	\$180,000 (\$15k/month)	10+
	\$240,000 (\$20k/month)	

(Check ✓) Top Retirement Concern(s):

- Outliving my Money
- Leaving a Legacy
- Rising Costs in Retirement
- Investment Fees
- Inattentive Broker
- Inflation
- Market Risk

Additional Retirement Priorities:

“Income is the Outcome that matters MOST in retirement.”

–Karl Tucker



Customize the dates below with the dates following your seminar and your schedule

Venue Name - Name of Presentation – Date of Seminar - Advisor Name

Name _____	Spouse _____	Table # _____
Date of Birth: Self ____/____/____	Spouse ____/____/____	
Cell Phone (____) ____-____	Home Phone (____) ____-____	
Address _____		
City _____	State _____	Zip _____
Email address _____	Email _____	
Occupation _____	Former Occupation _____	
Spouse Occupation _____	Spouse Former Occupation _____	

Please indicate your 1st and 2nd choice next to a time slot below that works for you to meet.

Day of Week - Month Date

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11:00 _____
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Retirement Income Plan Consultation

Please answer the questions on the back to meet with the appropriate advisor.