HARVEST
FINANCIAL ADVISORS

CLIENT WORKSHEET

Social Security Zoomer

Identify the resources you have to fund your retirement. The program will estimate your Living Expenses.

Personal Information

	C CLIENT	CO CO-CLIENT
Name		
Gender	☐ Male ☐ Female	☐ Male ☐ Female
Date of Birth	/ /	/ /
Email Address		
Employment Status	☐ Employed ☐ Retired ☐ Business Owner ☐ Homemaker	☐ Employed ☐ Retired ☐ Business Owner ☐ Homemaker
Employment Income	$	$
Marital Status		
State of Residence		

Social Security Benefits

If available, provide your Social Security estimate from ssa.gov.

	C CLIENT	CO CO-CLIENT
Are you eligible?	☐ Yes ☐ No ☐ Receiving Now	☐ Yes ☐ No ☐ Receiving Now
Benefit amount	Primary Insurance Amount (PIA) $	Primary Insurance Amount (PIA) $
When to start	☐ at Full Retirement Age (per Social Security) ☐ at age ☐ at retirement	☐ at Full Retirement Age (per Social Security) ☐ at age ☐ at retirement

Retirement Income

If available, provide your pension statement. If you have a lifetime pension, put "End of Life" in the "Year It Ends" column.

DESCRIPTION	OWNER	MONTHLY INCOME	START YEAR	YEAR IT ENDS OR NO. OF YEARS	% SURVIVOR BENEFIT	CHECK IF AMOUNT INFLATES	GPO
e.g., ABC Pension	C Co	*$ 1,500*		End of Life	*50%*		
		$					
		$					

Investment Assets

Identify all the resources you have to fund your goals. Don't worry about determining the exact amounts — reasonable estimates are fine. If available, provide your investment statements.

ESTIMATE OF OVERALL ALLOCATION Cash ____ % Bond ____ % Stock ____ %

C CLIENT

INVESTMENT TYPE	CURRENT VALUE	ANNUAL ADDITIONS	APPROXIMATE ALLOCATION		
			CASH	BOND	STOCK
Retirement Plans (e.g., 401k, 403b)	$	$ or %	%	%	%
Employer Match	$	$ or %			
Traditional IRA	$	$	%	%	%
Roth IRA	$	$	%	%	%
529 Savings Plan	$	$	%	%	%
Annuities	$	$	%	%	%
HSA	$	$	%	%	%
Taxable / Brokerage	$	$			
Other	$	$			

Co CO-CLIENT

INVESTMENT TYPE	CURRENT VALUE	ANNUAL ADDITIONS	APPROXIMATE ALLOCATION		
			CASH	BOND	STOCK
Retirement Plans (e.g., 401k, 403b)	$	$ or %	%	%	%
Employer Match	$	$ or %			
Traditional IRA	$	$	%	%	%
Roth IRA	$	$	%	%	%
529 Savings Plan	$	$	%	%	%
Annuities	$	$	%	%	%
HSA	$	$	%	%	%
Taxable / Brokerage	$	$			
Other	$	$			

Risk Score

	CLIENT	CO-CLIENT
How much market risk are you willing to accept? On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what's your risk score?		

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