Sunrise Advisors ~ Financial Planning Inputs

This sheet is designed to help collect and organize the information needed to develop your Retirement Lifestyle Plan. If you have any questions as you complete these inputs, please contact us at (913) 681-0215.

Personal Information

Date: ___________

	Client 1	Client 2 (if applicable)
Name		
Date of Birth		
Current Income		
Anticipated Retirement Date		

Anticipated Retirement Income

	Client 1	Client 2 (if applicable)
Social Security*	/month	/month
Pension Income	/month	/month
Other Income	/month	/month

*Full Retirement Age amount. Your Social Security benefits can be obtained by visiting: www.ssa.gov

Assets, Liabilities, Life Insurance/Annuities

If you keep your own list or spreadsheet of these items, you can attach it to this form. If not, please use the other side of this page to list all of your assets, liabilities, and life insurance/annuities.

Expenses

Current monthly living expenses (average per month) _________ / MONTH (In after-tax dollars)

Expected budget in retirement (estimated monthly living expenses) _________ / MONTH (In after-tax dollars)

Other

Please list any other information that would help us better understand you or your financial situation (ex: health considerations, starting a family, receiving an inheritance, selling a business, etc.).

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Please return the above information to us. After receiving this information back from you, we will work on developing a personalized presentation to share with you. Thank you.

David P. Scott
Samuel R. Scott, CFP®

Sarah Scott Walsh, RN
David T. Walsh, JD, CFP®

Jenna D. Patterson
Timothy M. Wickey, JD

Assets (Bank, investment or retirement accounts, residence(s), farmland, business interest/ownership, rental properties, etc.)

Account Holder (Name or Title)	Asset Type (Checking, IRA, 401k, Trust, Home, Business, etc.)	Where Asset is Held (Bank or institution name)	Current Value ($)

Liabilities (Mortgages, business loans, lines of credit, auto loans, student loans, etc.)

Owner (Name or Title)	Description (What asset is the liability tied to?)	Details (Rate, duration, payment, etc.)	Liability Remaining ($)

Life Insurance / Annuities

Insured (Name)	Type (Term, Variable, Whole Life, Universal, etc.)	Face Value ($)	Cash Value ($)