**Lifetime Income Capability Analysis**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Zip Code: \_\_\_\_\_\_\_\_\_\_\_\_\_

Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Work Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
|  | Yourself | Spouse |
| Date of Birth |  |  |
| Current Pension/ Profit Sharing/ IRA/ 401(K) Assets | $ | $ |
| Average Rate of Return on Pension/ Profit Sharing/ IRA/ 401(k)/ Assets | % | % |
| Annual Retirement Contribution1. Employee Contribution
2. Employer Contribution
 | $\_\_\_\_\_\_\_\_\_\_\_\_$\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_$\_\_\_\_\_\_\_\_\_\_\_\_ |
| Current Value of Investable Assets (Mutual Funds, Stocks, Bonds, Cash) not included in Pension Assets above | $ | $ |
| Annual Deposits to Investable Assets | $ | $ |
| Average Rate of Return on Investable Assets | % | % |
| Total Current Annual Compensation  | $ | $ |
| Anticipated Retirement Age |  |  |
| Desired (After-Tax) Retirement Income(Example: Today’s After-Tax Income x 70%) | $ | $ |

 *Continue on Reverse…*

*Securities offered through LPL Financial, member FINRA/SIPC. Investment Advice offered through Integrated Wealth Concepts, a registered investment advisor. Integrated Wealth Concepts, Integrated Financial Partners and Harbor Strategies Group are separate entities from LPL Financial. ©Integrated Financial Partners.*

**Harbor Strategies Group** | 300 Fifth Ave, 3rd Floor, Waltham, MA 02451

Phone: 781.229.2300 | Fax: 781.890-5624 | Email: dcollins@harborws.com

**Lifetime Income Capability Analysis**

|  |  |  |
| --- | --- | --- |
|  | Yourself | Spouse |
| Real Estate – Current Market Value | $ | $ |
| Life Insurance Face Value(amount of death benefit you and your spouse are insured for) | $ | $ |
| Valuable Personal Property | $ | $ |
| Value of Practice/Business | $ | $ |

To receive a retirement distribution strategy calculation, please list your children and grandchildren:

|  |  |  |  |
| --- | --- | --- | --- |
| **Child Name** | **Age** | **Grandchild Name** | **Age** |
|  |  |  |  |

*Please list the current Custodians(s) for your qualified plan(s). Also, include any additional information specific to your situation, list any question you may have and/or areas of concern.*

|  |
| --- |
|  |

*Please return the above confidential information by scan, fax or mail.*

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