

# ARC<sup>TM</sup> QUESTIONNAIRE



## Client Information

	Name	Gender	Date of Birth	State of Residence	Risk Class
Client 1					
Client 2					

## Pre-Retirement Information

Type	Annual Gross Income	Occupation / Income Title	Expected Annual Increase	Retirement / End Age
Earned Income (Client 1)	\$		%	
Earned Income (Client 2)	\$		%	
Other (e.g. rental property, royalties, part-time work)	\$		%	
Other (e.g. rental property, royalties, part-time work)	\$		%	

## Expenses

Annual Expenses (not including debts below)	Inflation Adjustment
\$	%

## Debt

Debt Name (mortgage, credit card, etc.)	Remaining Balance Due	Current Annual Payment	Remaining Years of Payments	Interest Rate
	\$	\$		%
	\$	\$		%
	\$	\$		%
	\$	\$		%

## Retirement Assumptions

Income Goals	
Please provide either Gross, After-Tax, or Replacement Ratio	
Annual Gross Income (today's dollars)	\$
Annual After-Tax (today's dollars)	\$
Replacement Ratio of Current Gross Income	%

Expectations	
Years of Retirement	
Pre-Retirement Growth Rate	%
Post Retirement Growth Rate	%
Annual Inflation Adjustment	%

## Alternative Scenario

If retirement is not achievable under the assumptions listed above, please select one of the following adjustments:

☐ Spend Less    ☐ Retire Later    ☐ Combination

## Post-Retirement Income Sources

Type	Owner	Yearly Income	Inflation Adjustment	Age Income Begins	Age Ends (if applicable)
Social Security		\$	%		
Social Security		\$	%		
Other (specify in notes section)		\$	%		
Other (specify in notes section)		\$	%		

# ARC™ QUESTIONNAIRE CONT.



## Assets

Asset Name (i.e 401(k), Roth IRA, Brokerage)	Owner	Asset Value	Annual Contributions	Contributed By (Client, Spouse, Employer)
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

Cash Reserves (i.e Checkings, Savings, other)	Owner	Amount	Annual Contribution
		\$	\$
		\$	\$
		\$	\$

## Education Funding

Names of Children	Date of Birth	Annual Tuition (today's dollars)	Years in College	Tuition Inflation	Current Savings for Child	Current Contributions
		\$		%	\$	\$
		\$		%	\$	\$
		\$		%	\$	\$
		\$		%	\$	\$

## Insurance Policies

Type (i.e Life, Long Term Care)	Insured	Annual Premium	Premium Duration	Benefits	Cash Value	Inflation Adjustment (LTC only)*
		\$			\$	%
		\$			\$	%
		\$			\$	%
		\$			\$	%

\*Inflation Adjustment for LTC is assumed to be compound growth unless stated in the notes

Additional Notes