



# Retirement Assessment



1. Do you want to have enough money so that someday you can retire?  
Yes  No
2. Do you think you can achieve that goal without saving or investing money?  
Yes  No
3. Do you know how much money you will need each month during retirement?  
Yes  No
4. Do you know how much money you will receive from Social Security?  
Yes  No
5. Are you interested in accumulating money for your retirement or your kid's college education?  
Yes  No
6. What amount of money would you like to have at retirement?  
\$250,000  \$500,000  \$750,000
7. What would you be willing to save per week to reach that goal?  
\$25  \$35  \$45  \$55
8. Would you like a free estimate of how much you will need, what social security will provide, and how much you can accumulate for retirement?  
Yes  No

Surveyed by: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_ Time: \_\_\_\_\_ Am/PM

Name of Person (print): \_\_\_\_\_ Age: \_\_\_\_\_ M/F

Signature: \_\_\_\_\_