

# Morgan Stanley

The MCMP Retirement Planning Group

# Complimentary Retirement Income Plan

## Confidential Questionnaire

### PERSONAL DATA

	You	Spouse
Name		
Date of Birth		
Street Address City, State, Zip		
Email Address		
Business Phone		
Alt Phone (Home/Mobile)		

### EMPLOYMENT DATA

	You	Spouse
Employer		
Year of Hire		
Salary		

### RETIREMENT GOALS

	You	Spouse
Estimated Retirement Date		
Desired Income Amount (After-Tax)	\$	



#### THE MCMP RETIREMENT PLANNING GROUP AT MORGAN STANLEY

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**PENSION BENEFITS**

Estimated Value at Retirement	You	Spouse
<b>Lump Sum Payout</b>	\$	\$
<b>Monthly Annuity</b>	\$ per month	\$ per month

**PROFIT SHARING/401(K) PLAN**

	You	Spouse
<b>Total Current Balance</b>	\$	\$
Your Contributions	%	%
Employer Contributions	%	%

**OTHER INVESTMENT ASSETS**

	You	Spouse
Traditional IRAs	\$	\$
Roth IRAs	\$	\$
Investment Accounts	\$	\$
Savings Accounts	\$	\$
Other _____	\$	\$

**OTHER SOURCES OF RETIREMENT INCOME**

	You	Spouse
Social Security	\$ At Age _____	\$ At Age _____
Future Employment Income	\$ per year	\$ per year
Other _____	\$	\$

**ADDITIONAL INFORMATION**

If you have questions or would like to schedule a meeting to discuss your retirement options, please contact:

**Benjamin L. Keith, CFP®**

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 Investment Consultant  
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