

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
Lump Sum Payout	\$	\$
Monthly Annuity	\$ per month	\$ per month

PROFIT SHARING/401(K) PLAN

	You	Spouse
Total Current Balance	\$	\$
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:

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