

Financial Planning Exercise: Retirement Projection Questionnaire



Given the current economic downturn and recent stock market decline, many people are unsure about the prospects for retirement, and are reevaluating their retirement assumptions. We created this form to help investors get a better understanding of where they stand right now with respect to their goals. If desired, you may return this questionnaire and Peridot Capital will generate a report that details the progress and projections of your retirement savings plan for a \$99 fee. Projections will be sent out within 2-4 weeks of receiving your form. You may follow-up with us to discuss it within the context of your current investment strategy.

Name of Client(s): _____

Email Address: _____

Mailing Address: _____

	<u>Yourself</u>	<u>Spouse</u>	<u>Combined</u>
Current Age	<input type="text"/>	<input type="text"/>	
Current Retirement Savings Balance	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Current Annual Retirement Savings Contribution (if applicable)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Desired Retirement Age	<input type="text"/>	<input type="text"/>	
Estimated Monthly Living Expenses In Retirement (today's dollars)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Estimated Monthly Social Security Income In Retirement*	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Estimated Monthly Pension Income In Retirement (if applicable)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

** Use the benefit statement that the Social Security Administration mails you each year to estimate your monthly benefit based on what age you figure to retire*

Please return this completed form along with a check or money order for \$99 (payable to Peridot Capital Management) to the mailing address below:

**Peridot Capital Management LLC
3945 Forbes Ave #395
Pittsburgh, PA 15213**