IncomeNavigator

Questionnaire

Submit Form

General Account Information

ADVISOR INFORMATION

Date Analysis Needed		Today's Date	
Financial Advisor Name		Click to Insert Logo Here	
Firm Name			
Advisor Fee Desired	◯ Same as CCMG ◯ Other:		

HOUSEHOLD INFORMATION

Household Name		
	Spouse 1	Spouse 2
Client Name		
Birth Date		
Current Age		
Target Retirement Date		

Would you like help introducing the income plan/proposal to your client?	◯ Yes ◯ No
Preferred Inflation Assumption	◯ 2% ◯ 3% ◯ 4% ◯ Other

Please enter any existing accounts in the client's name. Provide client statements if available.

	Registration Names	CCMG to Manage?	Account Type	Current Value
1		◯ Yes ◯ No		$
2		◯ Yes ◯ No		$
3		◯ Yes ◯ No		$
4		◯ Yes ◯ No		$
5		◯ Yes ◯ No		$
6		◯ Yes ◯ No		$
7		◯ Yes ◯ No		$
			Current Investable Assets	$ 0

Accumulation Period

Accumulation Period Information

When will you begin taking withdrawals (year)?	

If you intend to begin taking withdrawals immediately, enter the current year above and ignore the Contribution section below.

Please enter the Contributions you intend to make during the Accumulation Period in the section below.

Contribution Description	Annual Contribution	Start Year*	End Year*	COLA**
	$			
	$			
	$			
	$			
	$			

*Start Date refers to 1/1 of year while End Date refers to 12/31.**Cost of Living Adjustment Percentage

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Distribution Period

Distribution Period Information

If you have a desired monthly income amount during your Distribution Period, please enter it below.

Gross **Monthly** Income Required (Pre-Tax Dollars)	$

OPTIONAL. Please complete this section if your Gross Monthly Income Required will change over time.

Time Frame	Time Frame Description	Duration Years	Monthly Income Need
1			$
2			$
3			$
4			$
5			$

Please enter the income that will supplement your investment plan during the Distribution Period.

Annual Income Sources	Spouse 1	Start Year	End Year	COLA*	Spouse 2	Start Year	End Year	COLA*
Social Security	$				$			
Defined Benefit/Pension	$				$			
Annuities	$				$			
Business/Property Sale	$				$			
Inheritance	$				$			
Other 1	$				$			
Other 2	$				$			
Other 3	$				$			

*Cost of Living Adjustment Percentage

Legacy

Legacy

OPTIONAL: If you wish to leave a specific legacy amount at the end of the investment plan, please enter the amount below.

Desired Legacy Amount	$
Maximize Legacy	◯ Yes

Maximizing your legacy ensures that the largest amount possible will remain after your monthly income needs are met. If you choose that option, DO NOT enter a Desired Legacy Amount.

NOTES. Enter additional instructions here