



Today's Date _____

Kelly Capital PARTNERS

Plan to Retire Well

Confidential Family Questionnaire

PLEASE BRING ALL ASSET STATEMENTS AND SOCIAL SECURITY STATEMENTS TO YOUR 1ST APPOINTMENT

First Name	Last Name	Age	Birth Date	U.S. Citizen(Y/N)
Spouse First Name	Last Name	Age	Birth Date	U.S. Citizen (Y/N)
Residence Address	City	State	Zip Code	
Home Phone	Cell Phone Mr.		Cell Phone Ms.	
Mr. Email Address		Ms. Email Address		

CHILDREN

Name	Age	State of Residence
Name	Age	State of Residence
Name	Age	State of Residence

Number of Grand Children _____

How did you originally hear about Kelly Capital Partners? _____

Have you heard our radio show: Kelly Capital Retirement Talk? Yes No (Circle one)

Have you visited our website www.kellycapitalpartners.com? Yes No (Circle one)



OCCUPATION

Mr. Occupation _____ Employer (last if retired) _____

If not retired, approximate date of retirement: _____ Retirement Date: _____

Mrs. / Ms. Occupation _____ Employer (last if retired) _____

If not retired, approximate date of retirement: _____ Retirement Date: _____

REAL ESTATE

	Value	Mortgage/Interest Rate
Home	\$ _____	\$ _____
Vacation Home	\$ _____	\$ _____
Rental	\$ _____	\$ _____
Property	\$ _____	\$ _____

Do you plan to stay in your home past retirement? _____

SOURCES OF INCOME

	Pre- retirement		Post retirement	
	Mr.	Ms.	Mr.	Ms.
Wages	\$ _____	\$ _____	\$ _____	\$ _____
Pension	\$ _____	\$ _____	\$ _____	\$ _____

What age is the pension available? _____ What survivor option have you chosen? _____

Social Security

Mr. Planning to take Social Security at age _____ Benefit Amount \$ _____

Ms./Mrs. Planning to take Social Security at age _____ Benefit Amount \$ _____

Other sources of income (i.e. dividends, inheritance, rental income) \$ _____

Current Annual Household Expenses: \$ _____

Desired Annual Income in Retirement: \$ _____



ASSETS

	Mr.	Ms.	Joint
Checking	\$ _____	\$ _____	\$ _____
Savings	\$ _____	\$ _____	\$ _____
MMF	\$ _____	\$ _____	\$ _____
CD's	\$ _____	\$ _____	\$ _____

INVESTMENTS (Non Retirement)

	Mr.	Ms.	Joint
Stocks	\$ _____	\$ _____	\$ _____
Bonds	\$ _____	\$ _____	\$ _____
Mut. Funds	\$ _____	\$ _____	\$ _____
Annuities	\$ _____	\$ _____	\$ _____

RETIREMENT ASSETS

	Mr.	Ms.
IRA	\$ _____	\$ _____
	\$ _____	\$ _____
Roth IRA	\$ _____	\$ _____
	\$ _____	\$ _____
403B	\$ _____	\$ _____
Pension	\$ _____	\$ _____
	\$ _____	\$ _____
401-K	\$ _____	\$ _____
	\$ _____	\$ _____

Accounts you are contributing to: _____ Amount \$ _____ Match \$ _____

Accounts spouse is contributing to: _____ Amount \$ _____ Match \$ _____