

Preparing for Our Annual Renewal Meeting

Please take a few minutes to complete this form at least two weeks prior to our Annual Renewal Meeting. (Estimated time to complete = 10 minutes)

This information will help us better understand your personal and financial situation, so we can keep your plan current and make recommendations if needed.

If you're a couple, please both fill in the information or else each fill out the questionnaire separately.

We're really looking forward to catching up, and renewing our focus on what's coming up for you.

** Indicates required question*

1. Email *

2. Today's Date *

Example: January 7, 2019

3. Your Name(s) *

4. Has any contact information changed? Mailing address? Phone? Email? If so, please write your new information.

About You

5. What are your most pressing financial concerns? *

6. What are you most pressing non-financial concerns? *

7. Do you have any new life or career goals, even if they're vague? What are they?

8. Have any changes happened that we should know about? (ex., new home, new job, new child, bonus, deaths, inheritances, illness, etc.)

9. What changes in your finances do you expect in the future, that you want to plan for? (ex., bonuses, inheritance, job change, family obligations, etc.)

10. Has there been a change to the people you are financially responsible for, or could be? (ex., You now know you might need to support your mom.)

About Your Income and Expenses

11. Do you have income other than from your investment portfolio? If so, please itemize the sources and amounts here: rental, contract work, etc. *(Reminder: For couples, please provide answers for each person.)* *

12. Have your housing costs changed in the last year? If Yes, how much is your monthly housing cost (rent or mortgage+tax+insurance)? *

13. How much do you spend each month, on average, for living expenses, *excluding* your home and debt payments? (You can see the # we currently have for you in [RightCapital](#) > Profile > Expenses > Pre-Retirement Living Expenses.)

Managing Your Risks

14. Have you updated your estate planning documents (will, trust, power of attorney, etc.) in the last year? *

Mark only one oval.

- n/a; I don't have estate planning documents.
- No
- Yes, and we sent you a copy
- Yes, but we didn't send you a copy

15. Have you updated your insurance coverage in the last year (life, disability, auto, renter's/homeowner's, umbrella, etc. We don't care about *health* insurance in this question.)? *

Mark only one oval.

- No
- Yes, and we sent you either the new policy terms or a copy of the new policy
- Yes, but we didn't send you the details

Miscellaneous

16. Do you have any plans at this time to earn money or otherwise return to work? If so, tell us a bit about it.

17. If you have shares of former-employer stock, is anything happening with that stock? Ex., news of an IPO or tender offer or acquisition? Other?

Finishing Up

18. Tell us about one thing (or more!) you've done in the last year that you're proud of. We want to know!

19. Tell us about one thing (or more!) you've spent money on in the last year that brought you joy. We love these answers.

20. Tell us about one organization or person (or more!) you gave money to that made you happy! From giving \$ to charities to treating a friend to dinner.

21. Is there anything we've missed?

22. What would you like to talk about when we meet? *

23. Please provide any additional info or upload any additional documents to RightCapital that you think will be relevant to our discussion.

See you soon!

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