

# Stoker Ostler

BMO  | A part of BMO Financial Group

## Personal Information

	Prospect 1	Prospect 2
Name		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Birthdate		
Marital Status		
Employment Status		
Employment Income	\$ _____	\$ _____
Other Income		
State of Residence		
Citizenship (U.S./Other)		

## PERSONAL OBJECTIVE:

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## NOTES:

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## Risk Tolerance

Very Conservative    Conservative    Moderate    Aggressive    Very Aggressive



## Retirement Living Expenses (after tax):

Ideal: \$ \_\_\_\_\_      Acceptable: \$ \_\_\_\_\_

## Any expenses that will end during retirement (such as a mortgage, alimony, other loan, etc.)?

Expense: \_\_\_\_\_      Annual Amount: \$ \_\_\_\_\_      Year it will starts/ends: \_\_\_\_\_  
 Expense: \_\_\_\_\_      Annual Amount: \$ \_\_\_\_\_      Year it will starts/ends: \_\_\_\_\_  
 Expense: \_\_\_\_\_      Annual Amount: \$ \_\_\_\_\_      Year it will starts/ends: \_\_\_\_\_

## Retirement Age

	Prospect 1	Prospect 2
<b>Desired Retirement Age:</b>	_____	_____
<b>Acceptable Retirement Age:</b>	_____	_____
<b>Health Status:</b>	<input type="checkbox"/> Average <input type="checkbox"/> Exceptional <input type="checkbox"/> Poor	<input type="checkbox"/> Average <input type="checkbox"/> Exceptional <input type="checkbox"/> Poor
<b>Family Longevity:</b>	<input type="checkbox"/> Average <input type="checkbox"/> Long <input type="checkbox"/> Short	<input type="checkbox"/> Average <input type="checkbox"/> Long <input type="checkbox"/> Short

## GOALS (ex. College, travel, new home, car purchase, etc.)

Goal Importance (Circle One)	Needs			Wants				Wishes		
_____	10	9	8	7	6	5	4	3	2	1
_____	10	9	8	7	6	5	4	3	2	1
_____	10	9	8	7	6	5	4	3	2	1
_____	10	9	8	7	6	5	4	3	2	1

## RESOURCES

### Social Security Benefits

	Prospect 1	Prospect 2
Are you eligible?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If receiving now, amt:	\$ _____ Per Month	\$ _____ Per Month

### Other Retirement Income (Do not include income such as interest & dividends from investments)

Description	Prospect 1 Income/Month	Year It Ends	Prospect 2 Income/Month	Year It Ends
	\$		\$	
	\$		\$	
	\$		\$	

### Investment Assets

Description	Prospect 1 Value	Additions/Year	Prospect 2 Value	Additions/Year
Employer Plans (401K)	\$	\$ or %	\$	\$ or %
Traditional IRA	\$	\$	\$	\$
Roth IRA	\$	\$	\$	\$
Tax-Deferred (annuities)	\$	\$	\$	\$
529 Plans	\$	\$	\$	\$

Taxable Accounts	Value	Total Additions/Year
	\$	\$
	\$	\$
	\$	\$
	\$	\$

### Cash from other sources that will be used to fund Goals (e.g. inheritance, sale of property)

Description	Year Received	Amount (After-tax)
		\$
		\$
		\$