

Information you can provide (your notes, actual documents, etc.) with respect to any of the following applicable items will help us build your initial scenario in our Goal Planning & Monitoring application. Our continued collaboration to refine and monitor your plan will be an iterative process.

- Date(s) of Birth
- Current Employment Income(s)
- Desired Plan Starting Age(s)/Date(s)
- Spending Needs During Plan
- Additional Spending Goals (Education Funding, Leave Inheritance, etc.) and Amounts
- Income Sources and Amounts
 - Employment / Part-Time
 - Social Security
 - Pensions
 - Other
- Available Assets and Values (Outside of Raymond James) and Planned Contributions/Savings Amounts
 - 401(k) or Other Retirement Plans
 - Brokerage Accounts
 - Checking or Savings Accounts
 - CDs or Money Market Accounts
 - Other Assets (Businesses, Homes, Property, etc.)
- Investment Risk Profile
 - Aggressive (Stocks)
 - Balanced (Mix of Stocks and Bonds favoring Stocks)
 - Conservative (Mix of Stocks and Bonds favoring Bonds)