

Client Questionnaire – Married Couples

Client name	Husband	Wife
Date of birth	Husband	Wife
Age on nearest birthday	Husband	Wife
Primary insurance amount (PIA)	Husband \$	Wife \$
Life expectancy	Husband (default 85)	Wife (default 95)

Still working?

Husband:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Annual income from work \$
Wife:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Annual income from work \$
Expected date of retirement	Husband	Wife
Amount of desired retirement income \$		(joint)

Date of this marriage

Former marriages

Husband: Date of former marriage			
Date marriage ended	Total number of years married		
Reason marriage ended:	<input type="checkbox"/> Death <input type="checkbox"/> Divorce	If divorce, is ex-spouse still alive?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Wife: Date of former marriage			
Date marriage ended	Total number of years married		
Reason marriage ended:	<input type="checkbox"/> Death <input type="checkbox"/> Divorce	If divorce, is ex-spouse still alive?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Minor children at home (or adult child disabled before age 22)? Yes No

Name	Age
Name	Age

Adjusted gross income from latest tax return \$

Current income (joint)

Work	\$
Pensions	\$
Investments	\$
Other	\$
Total income	\$

Assets

Retirement accounts	\$
Savings and investment accounts	\$
Real estate not including home	\$
Other	\$
Total Assets	\$

Ever worked in a non-Social Security covered job? Husband Yes No Wife Yes No

If yes:

Name of employer

Amount of pension \$ When entitled to pension

Also worked in covered job? Yes No Number of years worked