



The three types of questions we need you to answer and why...

Our analysts and advisors are dedicated to your retirement success -- with answers at hand, you can answer the rest of this survey in record time



# GENERAL QUESTIONS

## GENERAL QUESTIONS INCLUDE:

- > Your birthday
- > Expected age or year of retirement

**WHY:** As advisors and fiduciaries, we abide to the “Know Your Customer” rule. This is a rule any licensed professional advisor must adhere to before giving financial advice.

We never give advice without the facts and knowing specific goals and plans for people who may be interested in our services. Our advice must be based on person’s specific needs, risk tolerance and future expectations.



## Question asking your BEST GUESS OR OPINION:

- > Approximate amount you wish to withdraw from your TSP once you retire (or if retired what currently taking from TSP)
- > The question of longevity – given your family history or medical advances, to what age do you believe you or anyone you are financially responsible for will need income to cover lifestyle?

BEST GUESS  
or OPINION



**WHY:** As part of your advisor meeting, you will receive a complimentary analysis and retirement map showing how your TSP fits in your long-term retirement plan. We specifically discuss your TSP and the cash flow it provides.

If you choose, you can take advantage of your time with your advisor and have a brief discussion of your cash flow longevity and your retirement plans in general

# Questions regarding SPECIFICS ABOUT YOUR TSP

We suggest you have a recent TSP Statement AND your current Leave & Earnings Statement with you to complete these questions.

## From TSP STATEMENT

- > Date of statement you are using to answer the questions
- > TSP balance and statement if you have both Roth & Traditional
- > Name of each fund you are in and current amount in the fund.

## From LEAVE AND EARNINGS STATEMENT

- > Amount per paycheck you are contributing to your TSP (If any)
- > Amount of match you are receiving from the government (if any)

TSP Investment Funds					
TSP G Fund	TSP F Fund	TSP C Fund	TSP S Fund	TSP I Fund	
"Classic" TSP Lifecycle Funds					
TSP L Income Fund	TSP L 2030 Fund	TSP L 2040 Fund	TSP L 2050 Fund		
New TSP Lifecycle Funds					
TSP L 2025 Fund	TSP L 2035 Fund	TSP L 2045 Fund	TSP L 2055 Fund	TSP L 2060 Fund	TSP L 2065 Fund

QUESTIONS  
SPECIFIC TO  
YOUR TSP

**WHY:** In determining your risk tolerance (a critical part of our analysis) we need to know current status of your TSP and the risk you are currently taking. Before meeting with your advisor, you will be taking a risk tolerance survey which will provide us with a way to compare your current investment risk portfolio risk your real risk score.

By using our analytical tools, we can help you see if your current management style is right on track or if you are at risk of making decisions based on emotion that may hurt your chances of achieving your retirement goals.

# INTERESTED IN SEE THE QUESTIONS AND HOW THEY SHOW UP ON THE SURVEY?

- If you have the answers to the questions on the last three pages, you are ready – you know what is needed to fill out what we call the **ADVISOR'S SURVEY** and why.
- If you want to see where to place your answers, feel free to view the video or continue reading.
- In the video version, Connor Mallow, our lead analyst gives you a walkthrough on how to answer the questions.

**ENJOY!!**

# How to fill in this survey. An easy guide to each screen



*Before meeting with an advisor, by using the survey found on this webpage, you can easily enter the information needed for your meeting*

*It makes your time together efficient and of extra value to you!!*

Welcome. We look forward to meeting with you to discuss specifics about



🕒 Takes 7+ min

**Start**

We Start Here

1→ **Hello, My name is Connor Malloy and I am the Senior Analyst at Wealth Strong Life Solutions. I look forward to meeting with you later.**

FIRST NAME -- Please provide your first name here

Type your answer here...

---



8 of 10 answered

Powered by **Typeform**



Question 1 – enter just your first name



2→ **Before meeting with our senior advisor I will help you prepare so your time can be efficiently spent together.**

LAST NAME: Now, please type your last name below.

.

OK ✓



9 of 10 answered

Powered by **Typeform**



Question 2 – enter your last name

3 → **Thanks \***

Our offices are located in the Denver metro area however, we do much of our work virtually.

To do that, we need your email

Please provide the best email to contact you.

•

OK ✓



**FinER CENTER**  
FINANCIAL EDUCATION RESOURCE CENTER  
A non-profit educational provider

**Wealth Strong® Life Solutions**  
Wealth Strong

**Federal Employee BENEFITS CENTER**  
A non-profit educational provider

Professional Advisors, Actuaries and Asset-Writing Advisors dedicated to helping you reduce wealth transfer, enhance and flow liquidity, and optimize funding solutions and efficiently reduce risk. Making our shared your knowledge of financial concepts and strategies is MONEY WISE! 1989-2022



**Wealth Strong® Life Solutions**  
Administrative Offices  
5944 S Kipling Parkway  
Littleton, CO 80127



**Wealth Strong® Life Solutions**  
Federal Employee Benefits Center  
2625 Redwing Road  
Ft Collins, CO 80527

9 of 10 answered

Powered by **Typeform**



Question 3 - your Email

Later, if you choose, you will be speaking directly with an advisor who will work with you to find the SafetyNET program which matches your risk tolerance.

Our scheduling department will call to set up an exact time and date for that discussion.

For that, our Scheduling Department needs the best phone number for our Scheduling department to reach you. On this screen please provide that number.

  (201) 555-0123


OK 



Question 4 - your best phone number

5 → **It helps our scheduling department to have a second number - since some people use different numbers different times of the day \***

If you are always at the same number, just type in the number you entered on the last screen

 ▾ (201) 555-0123

OK ✓



Question 5 - phone other times of day for our schedulers

6 → **You will be meeting with Evonne Ryan. She is the Senior Advisor at Wealth Strong Life Solutions \***

Prior to your meeting - Evonne asks you to provide some information so we can have materials ready for your discussion.

Ready to get started? Just click on A below.

Choose 1

A Yes - I am ready to move on

B I would like to know more about this advisor and the company I would be working with before moving on



6 of 8 answered

Powered by Typeform



*Want additional information?*

*On the next page you will be directed to links to find out more.*

*If you have additional questions, you can also request a phone call.*

Ready to move on or want additional info?

7 → **We are happy to provide you that information**

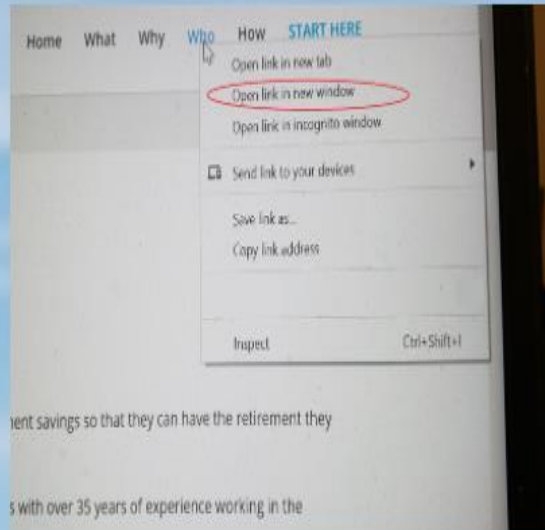
At the bottom of the WHO page are links to give you information you can study.

Then, when ready, click back on the tab for this window to move on.

Choose 1

**A** Thanks - I have the info I needed - I am ready to move on

**B** I want additional information or have questions - please have someone call me ( I will tell you the best time to contact me on the next screen).



6 of 7 answered

Powered by **Typeform**

Choosing B will move you to a page asking best times for our scheduling department to call you to schedule a phone meeting to answer questions and help you fill out this form.

Also, you will receive a list of the questions we will need answered to help finalize this form.

Find answers or ask for help

8 → **Accurate information is needed to be able to discuss if and how a SafetyNET program may be of value to you \***

And you can be assured, as Fiduciaries, we have strict rules regarding confidentiality. Your information is kept in strict confidence.

Please choose one

**A** Great -I am ready please continue ✓

**B** Why do you need this information?

**OK** ✓



9 of 10 answered

Powered by **Typeform**



Learn about our commitment as fiduciaries

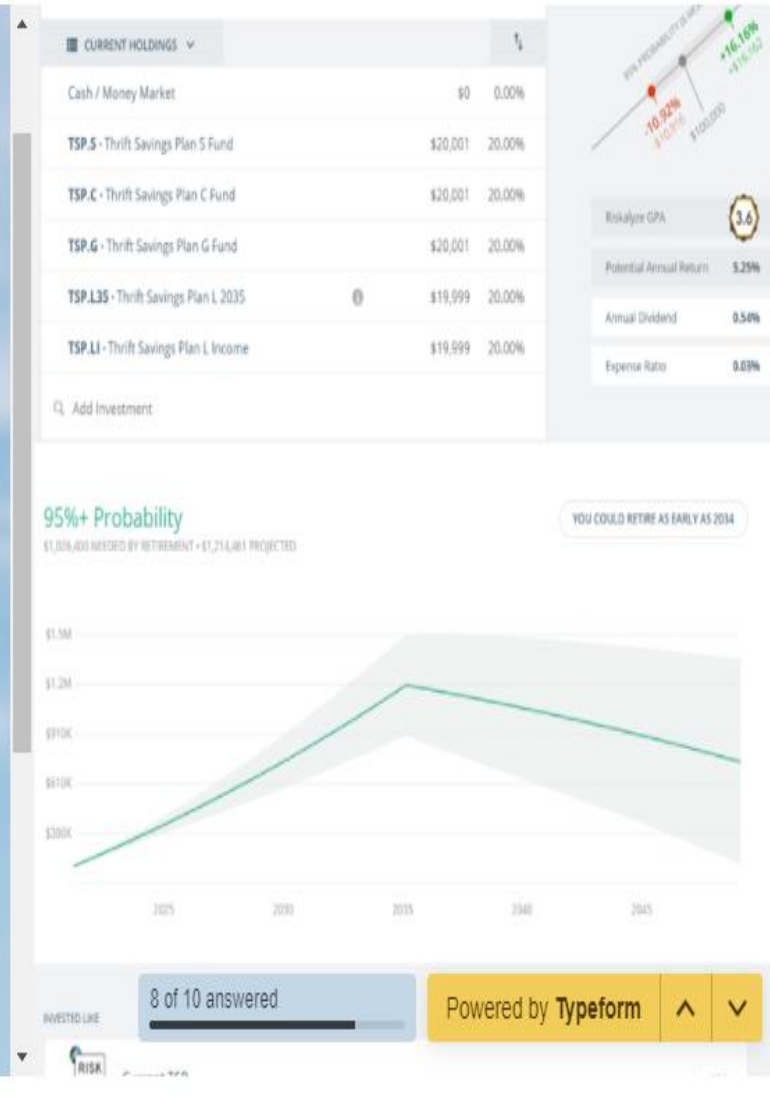
9 → This information will allow the advisor to understand your current risk score and prepare a complimentary retirement map for you \*

By providing accurate information we can tell you with a 95% probability how possible it is to meet your retirement goals. It is important to understand this and also your real risk score.

Choose 1

A I got it - I am ready to enter the data

B I would rather just have someone ask me the questions



Choosing B tells us you need to meet before finishing this survey.

*You will receive a list of questions to be ready to discuss. We will meet by phone.*

Choosing A will allow you to move enter your own data. Depending on your retirement system, you will enter data regarding your TSP. Please have a copy of your tsp information ready.

Information regarding the retirement map you will receive



Based on your answer, this interactive form chooses the pages with questions specific to the federal retirement system you participate in. Your answers are kept confidential and only accessed by our analysts and advisors.

10 → **We begin with your retirement system - please choose \***

Your answer saves time in the preparation of your retirement map - retirement map structure is slightly different depending on your answer.

Choose 1

A Active CSRS or CSRS offset

B Active FERS or FERS Transfer

C Active Military

D Retired CSRS or FERS

E Retired Military



9 of 10 answered

Powered by **Typeform**



Choose your retirement system and retirement status



11 → Please provide your birthday month and year \*

Type your answer here...

10 of 16 answered

Powered by **Typeform**



This question asks you to add your birthday



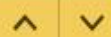
12 → If you are not already retired, at what age do you wish to retire from federal employment \*

Hopefully before this age -- and if you are retired please typed "retired" in the space below

OK ✓

12 of 16 answered

Powered by **Typeform**



This question asks if retired or when you plan retirement

13 → **Please provide answers to these 5 questions based on your latest TSP statement \***

1. What is the date of the statement you are reading this information from?
2. What is the balance in your TSP
3. Is it split between Traditional TSP and a Roth TSP?
4. What funds are you in?  
Please specify G, F, C, S, I or L funds (see chart)
5. How much is in each fund?

Type your answer here...

**TSP Investment Funds**

TSP G Fund	TSP F Fund	TSP C Fund	TSP S Fund	TSP I Fund
---------------	---------------	---------------	---------------	---------------

**"Classic" TSP Lifecycle Funds**

TSP L Income Fund	TSP L 2030 Fund	TSP L 2040 Fund	TSP L 2050 Fund
-------------------------	-----------------------	-----------------------	-----------------------

**New TSP Lifecycle Funds**

TSP L 2025 Fund	TSP L 2035 Fund	TSP L 2045 Fund	TSP L 2055 Fund	TSP L 2060 Fund	TSP L 2065 Fund
-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

12 of 17 answered

Powered by **Typeform**



We ask you to enter 5 questions regarding your TSP -It is easiest to answer with a TSP Statement in front of you

14 → Please provide answers to these questions based on your contributions to the TSP each paycheck \*

ALREADY RETIRED OR RETIRING IN NEXT MONTH OR SO, TO RETIREMENT? If so, PLEASE ADD THE WORD *RETIRED* ON THE LINE BELOW

1 Are you currently adding to the TSP each paycheck?

2 Including Traditional TSP and Roth, how much do you contribute each paycheck?

OK ✓



14 of 16 answered

Powered by **Typeform**



*If not contributing or retired, please say “retired” or “not contributing in the answer field instead*

Regarding your TSP contributions – it is best to use Information off your Leave & Earnings statement

others wish to leave their tsp as a legacy  
for their family.

15 → Regarding years in retirement - please type in your ans...

**PLEASE PROVIDE ANSWERS TO BOTH  
QUESTIONS BELOW**

**1 To what age do you want us to calculate  
withdrawals from your TSP? (in other  
words, we ask you to provide a number  
over 90 years old as your expected  
longevity.**

**2 How much are you taking out (if retired)  
or do you wish to take out of your TSP per  
month or year when you retire? (we will  
calculate how long that income will last in  
your retirement map)**



14 of 16 answered

Powered by **Typeform**



*If already retired and receiving distributions, please add. If you tell us you do not plan to take distributions, we will calculate RMDs and place that information in your retirement map.*

This question asks about your expected longevity and  
amt per month you wish to take from your TSP

17 → **Thanks for the great information  
- you are almost done**

**Know, we are here to help you  
take it from here. Now all we  
need is to find your Risk  
Tolerance score. \***

A and B will bring you to a page where  
you can immediately link to the Risk  
Tolerance Survey - It will also provide  
you a step-by-step video explaining the  
screens. Feel you n Pick C

**Submit**

A OK, I answered to the best of

YOU LOOK  
GOOD.

17 of 17 answered

Powered by **Typeform**



This question gives a choice on your next step – A or B  
takes you to the Risk Survey, C provides assistance

Please click complete and you  
will be directed to the page  
to complete your risk  
tolerance score

THANK YOU

[click here](#)

THANKS, this completes this survey – Time to move on to a page with directions for your RISK TOLERANCE survey



**Your  
retirement is  
important and  
we are ready  
to help**

Helping out with scheduling

From Wealth Strong Life Solutions

From SafetyNet Programs



Lori

Meagan

PJ

Kalani

and  
SafetyNET  
Program  
Staff

[Complete Survey](#)

If you asked for assistance, complete the survey here – we will contact you to schedule an appointment