



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.