



BOOTH BROKERAGE, LLC

Every client is a little different so let us tailor a plan just for you

Personal Information

Full Name: First _____ Middle _____ Last _____

Date of Birth: _____ Resident State: _____

Prior Planning

On a scale of 1 to 10, where do you fall with satisfaction of your current or future retirement income stream?

1 2 3 4 5 6 7 8 9 10

1= Not satisfied at all 10 = Very satisfied

If you said 5 or less, how much more income do you need and what is your timeframe? _____

On a scale of 1 to 10, how prepared are you for a long term care or extended illness event?

1 2 3 4 5 6 7 8 9 10

1= Not prepared at all 10 = Very prepared

If you said 5 or less, how would you fund this cost? Do you have any non-qualified annuity money that is out of surrender charges (tax-free advantage available)? _____

On a scale of 1 to 10, how concerned are you about protecting money from negative earnings?

1 2 3 4 5 6 7 8 9 10

1= Not concerned at all 10 = Very concerned

If you said 5 or more, what do you have that is at risk of losses? If you are 55 or older, do you have any 401K money that you want to protect? _____

On a scale of 1 to 10, do you have any money you are unhappy with the rate of return?

1 2 3 4 5 6 7 8 9 10

1= Not at all unhappy 10 = Very unhappy

If you said 5 or more, what rate are you currently earning? _____

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