

Other Income (e.g., trust income, part-time work, rental property income)

Do not include interest or dividend income from your future investment.

DESCRIPTION	ANNUAL AMOUNT	YEAR IT BEGINS	YEAR IT ENDS	% SURVIVOR BENEFIT	WILL THIS BENEFIT INCREASE WITH INFLATION?
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

INVESTMENT ASSETS

Please list any investment accounts, employer sponsored retirement accounts such as a 401(k), 403(b), profit sharing, 457, SEP, SARSEP and/or IRA accounts held away from Morgan Stanley below.

DESCRIPTION	OWNER	ACCOUNT TYPE	VALUE	ANNUAL SAVINGS/CONTRIBUTIONS	EMPLOYER MATCH
XYZ Brokerage Account [Sample]	Joint	Taxable	\$564,000	\$10,000	N/A
XYZ Company 401k Plan [Sample]	John	401k	\$775,000	Max	100% of 3%

Optional Savings

If your current assets and income sources fall short of your goals, let's explore some ways you could make up the difference.

Could you save more to fund your goals?	<input type="checkbox"/> Yes \$ _____ year <input type="checkbox"/> No
Please rank (1-3) potential ways to generate additional savings with 1 being most likely.	_____ Work longer _____ Save more _____ Spend less

Other Assets

Please provide information for other non-investment assets.

PRIMARY RESIDENCE

What is the current value?	\$ _____
Do you intend to sell your primary residence to help fund goals?	<input type="checkbox"/> Yes _____ year <input type="checkbox"/> No \$ _____ cash anticipated (after taxes)

Any information that you provide to us or that we provide to you is for investment education only. The information should not be viewed or relied upon as advice with respect to asset allocation or any particular investments. The information is provided to us on the condition that Morgan Stanley is not an adviser or a fiduciary to you as a result of gathering such information. To be used with the LifeView® Goal Analysis and/or LifeView® Advisor Tools.