

**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?

☐ Yes \$ \_\_\_\_\_ year  
☐ 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?

☐ Yes \_\_\_\_\_ year  
 \$ \_\_\_\_\_ cash anticipated (after taxes)  
☐ No

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