

SIPS REQUEST FORM

Advisor

Date Needed

Client 1

DOB

Client 2

DOB

Income

Current

SS

62

FRA

70

Pension

Age to Stop

Age to Start

Current

SS

62

FRA

70

Pension

Age to Stop

Age to Start

Age to Start

Acct Type

Q/NQ/Roth

Current Assets

Source

Source

Source

Source

Source

Source

Source

Source

Source

Owner

Owner

Owner

Owner

Owner

Owner

Owner

Owner

Owner

Amount

Amount

Amount

Amount

Amount

Amount

Amount

Amount

Amount

Target Income

Year to start

Inflation*

FIA (if being used)

Client

Carrier

Income Rider

Amount

Age to Start

FIA (if being used)

Client

Carrier

Income Rider

Amount

Age to Start

Notes

Detail assets being moved/combined into to AUM, etc

* Rate of Inflation will be applied to SS as well unless indicated otherwise.