

**FAX RIGHT AWAY TO (941) 556-0016**

**ATTENTION: DONNA PODOLAK**

**LPF FINANCIAL ADVISORS**

Lakewood Ranch Corporate Park  
7365 Merchant Court # 1  
Sarasota, FL 34240

Magnolia Executive Suites  
16017 North Florida Ave  
Lutz, FL 33549

Executive Suites of Lakeland  
1102 South Florida Ave.  
Lakeland, FL 33803

## PENSION INFORMATION REQUEST

*FAX or mail to one of the above addresses*

Employee Name: \_\_\_\_\_ Birth date: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Birth date: \_\_\_\_\_

Home Address: \_\_\_\_\_ Phone: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

### **Employee Information**

Business Address: \_\_\_\_\_ Room/Floor #: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Work Phone: \_\_\_\_\_ FAX: \_\_\_\_\_ Pager: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_ Work E-Mail: \_\_\_\_\_

Start Date: \_\_\_\_\_ Home E-Mail: \_\_\_\_\_

Current Average Annual Income: \_\_\_\_\_

Anticipated Retirement Date: \_\_\_\_\_

### **Major Areas of Concern**

- Evaluating my options
- Deciding between monthly pension and cash out
- Avoiding IRS penalties on retirement plans while receiving monthly income
- Financial planning for retirement
- IRA rollover accounts
- Tax planning
- Other: \_\_\_\_\_

*Copy and give to a friend!*