



BourkePorter_A

Questions Responses 30

Section 1 of 5

Lump Sum Analyzer



Our system can help you decide.

- 1 - Fill it out
- 2 - Get your analysis
- 3 - Easy!

Email address *

Valid email address

This form is collecting email addresses. [Change settings](#)

SSN (last 4 digits only) *

Short answer text

PERSONAL INFO

The basics.

First Name *

Short answer text



Short answer text

Sex (M/F) *

M

F

Date of Birth *

Month, day, year



State of Residence *

Short answer text

Do you have a spouse/partner? *

Yes

No

After section 1 Go to section 2 (SPOUSE/PARTNER INFO) ▾

Section 2 of 5

SPOUSE/PARTNER INFO



Spouse/Partner's Name *

Short answer text

Spouse/Partner's Age *

Short answer text

Spouse/Partner's Retirement Age

Short answer text

Spouse/Partner's Monthly Income

Short answer text

Spouse/Partner's Monthly Pension

Short answer text

After section 2 Continue to next section

Section 3 of 5

FINANCIAL STATUS



Home's equity?

What is the value of your home's net equity (Your home's value less remaining mortgage debt)

Short answer text

.....

Net Worth (w/o home equity) *

Your net worth (Assets minus liabilities) NOT including your house. For most this means assets like savings, retirement accounts, mutual funds and other things you could/would liquidate, less outstanding debts like credit cards and loans.



Short answer text

.....

Soc Sec Benefit (Monthly)

What is your expected SS benefit? If you would like the LSA to estimate it for you please check "Yes" in the box below.

Short answer text

.....

Have CREWSApp estimate?

Yes

No

Current monthly income *

Short answer text

.....



Section 4 of 5

HOUSING EXPENSES



Monthly housing costs.

Rent/Mortgage & Insurance *

Short answer text

Property Taxes & Upkeep

Short answer text

Year Mortgage Paid Up

Short answer text

After section 4 Go to section 5 (OTHER EXPENSES) ▼

Section 5 of 5

OTHER EXPENSES



Other monthly expenses.



Short answer text

Groceries *

Short answer text

Entertainment & Dining Out *

Short answer text

Medical Expenses *

Short answer text

Transportation (Auto, Transit) *

Short answer text

Miscellaneous (Travel/gifts/etc.) *

Short answer text

