



StanCorp Investment Advisers, Inc. will provide a more detailed Savings and Investment Plan if you provide additional information. Please complete this form, which is confidential and is not shared with your employer. If you have questions about how to complete this form, contact the Advisory Service Center at 800.858.5420.

SECTION 1: YOUR INFORMATION

Social Security Number	Last Name	First Name
Date of Birth		

SECTION 2: SCOPE OF RECOMMENDATION

Check either Yes or No. If you select Yes, you must complete Section 3. If you do not complete Section 3, we cannot include information about your spouse/partner in our recommendations.

- Yes, I want to include information about my spouse/partner. The recommendations from StanCorp Investment Advisers, Inc. will address the goal of providing a retirement income that will support both me and my spouse/partner. I understand that if I don't provide the following information about my spouse/partner, StanCorp Investment Advisers cannot include my spouse/partner in its planning.
- No, I do not want to include information about my spouse/partner. I understand that the recommendations from StanCorp Investment Advisers will focus on providing a retirement income that will support only myself. Please continue to Section 4. Do NOT complete Section 3.

SECTION 3: INFORMATION ABOUT YOUR SPOUSE/PARTNER (Complete if you answered "Yes" in Section 2)

1. Are you planning to tap into your retirement savings as of your retirement date, or your spouse/partner's retirement date?	<input type="checkbox"/> Self <input type="checkbox"/> Spouse/Partner
2. Spouse/Partner's Date of Birth (If not provided, we are unable to use your spouse/partner's retirement date.)	____/____/____
3. Spouse/Partner's Expected Retirement Age (We will assume age 65 if no response is provided.)	_____
4. Spouse/Partner's Current Annual Salary (We will assume \$0 if no response is provided.)	\$ _____
5. Spouse/Partner's Retirement Plan - 401(k)	
a. Current Pre-Tax Account Balance (include only your spouse/partner's pre-tax 401(k) balance)	\$ _____
b. Current Roth Account Balance (include only your spouse/partner's Roth 401(k) balance)	\$ _____
c. Approximate percent of salary your spouse/partner contributes each year (pre-tax)	_____%
d. Approximate percent of salary your spouse/partner contributes each year (Roth)	_____%
e. Employer Match (Please indicate a single percentage for your spouse/partner's match. For example, if your spouse/partner's plan provides a match of 50% on the first 4% of salary, you would indicate a match of 2% (4% multiplied by 50%).)	_____%
f. What percent of the current account balance is invested in stocks or stock funds? (If not provided, we will assume a response of "Between 30%-70%.")	<input type="checkbox"/> Less than 30% <input type="checkbox"/> Between 30%-70% <input type="checkbox"/> Greater than 70%

Please place in supplied envelope or return signed document to:

Standard Retirement Services, Inc.
1100 SW Sixth Avenue, P9A
Portland, Oregon 97204
Fax: 971.321.7998

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SECTION 4: OTHER RETIREMENT INCOME (Combined totals for you and your spouse/partner)**Outside Tax-Deferred Savings (Excluding Current Employer 401(k) Balance)**

Please provide information about any tax-deferred savings you or your spouse/partner have set aside for retirement. Do not include savings that will be used for other expenses such as college tuition. Examples include:

- Retirement plan assets from another employer (If you included your spouse/partner's retirement 401(k) balance in Section 3, do not add it again here.)
- Traditional (pre-tax) Individual Retirement Accounts (IRAs)
- Annuities

a.	Current combined account balance	\$ _____
b.	Approximate combined amount you and your spouse/partner contribute each year	\$ _____
c.	Do you and your spouse/partner plan to increase your contribution as your salary increases? (We will assume "no" if no response is provided.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
d.	Percent of the current account balance invested in stocks or stock funds? (We will assume "Between 30%-70%" if no response provided.)	<input type="checkbox"/> Less than 30% <input type="checkbox"/> 30%-70% <input type="checkbox"/> Greater than 70%

Outside Roth IRA and Roth 401(k) Savings

Please provide information about any Roth IRA savings you or your spouse/partner have set aside for retirement.

a.	Current combined account balance	\$ _____
b.	Approximate combined amount you and your spouse/partner contribute each year	\$ _____
c.	Do you and your spouse/partner plan to increase your contribution as your salary increases? (We will assume "no" if no response is provided.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
d.	Percent of the current account balance invested in stocks or stock funds? (We will assume "Between 30%-70%" if no response provided.)	<input type="checkbox"/> Less than 30% <input type="checkbox"/> 30%-70% <input type="checkbox"/> Greater than 70%

Outside Non-Tax-Deferred Savings

Please provide information about any non-tax-deferred savings you and your spouse/partner have set aside for retirement. Examples include:

- Bank Account
- Certificates of Deposit
- Mutual Funds not part of a retirement plan
- Stocks and Bonds not part of a retirement plan
- Brokerage Accounts

a.	Current combined account balance	\$ _____
b.	Approximate combined amount you and your spouse/partner contribute each year	\$ _____
c.	Do you and your spouse/partner plan to increase your contribution as your salary increases? (We will assume "no" if no response is provided.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
d.	Percent of the current account balance invested in stocks or stock funds? (We will assume "Between 30%-70%" if no response provided.)	<input type="checkbox"/> Less than 30% <input type="checkbox"/> 30%-70% <input type="checkbox"/> Greater than 70%

Pension Plan Income

If you expect to have income from a defined benefit pension plan during retirement, enter the monthly benefit here. Enter amounts for you and your spouse/partner payable at your individual expected retirement dates. You may receive a statement from your Plan Administrator periodically that contains this information. Don't forget to include any benefits payable from companies from which you've terminated employment.

Self \$ _____
(per month)

Partner \$ _____
(per month)

Social Security Income

Include Social Security Income in retirement planning assumptions? (We will assume "Yes" if no response is provided.) Yes No

SECTION 5: EMPLOYEE CERTIFICATION

This certifies that all of the above information is accurate. I understand that I am responsible for contacting the Advisory Service Center at 800.858.5420 to update my personal information on a regular basis.

Signature _____

Date _____

Printed Name _____

Social Security Number _____