



Confidential Pilot Questionnaire For United Airlines Pilots

Pilot Information

Full name	Birthdate
Address	City/State/Zip
Phone	Email
Aircraft/Ranking/Base	Employment Income
Military Veteran?	Retirement Date

Spouse Information

Full name	Birthdate
Phone	Email
Employer/Title	Employment Income
Military Veteran?	Retirement Date

Children/Grandchildren

Name	Birthdate	Notes	Name	Birthdate	Notes

Investment Assets

Description	Pilot	Spouse	Joint/Trust	Annual Additions	Notes
PCRA/PRAP 401K/403b (pre-tax)					
PCRA/PRAP 401K/403b (Roth/post-tax)					
Active HRA					
Retiree Health Account					
Traditional IRA					
Roth IRA					
Taxable Brokerage					
Checking/Savings					
Cash Value Life Insurance					
Total					

Notes:

Other Assets and Liabilities

(Ex. Primary Residence, Secondary Home, Rental Property, Automobiles, Airplane, Personal Property, Valuables, Life Insurance, etc.)

Description	Current Value	Purchase Price	Loan Balance	Monthly Payment	Years Remaining	Interest Rate	Notes
Primary Residence							
Total							

Notes:



Retirement Income

(Ex. Military/Other Pensions, Rental Income, Other Sources of Income, etc.) For PBGC Estimates, call 1-800-400-7242 (request ages 65, 68, and max)

Description	Monthly Income	Starting Age/Date	% Survivor Benefit	Inflation Adjusted? (Y/N)	Notes
Social Security- Pilot					
Social Security- Spouse					
PBGC/CPRP Pension					

Notes:

Retirement Goals

(Ex. Travel Expenses, Large Purchases, New Cars, Charitable Donations, Gifting, Leave Estate, etc.)

Importance (1-10)	Description	Start Year	Amount	How Often	End Year	Notes
10	Basic Living Expense	At 65		Monthly	End of Plan	

Notes:

On a scale of 1-10, with 1 being the lowest and 10 being the highest, how much risk are you comfortable accepting? Please explain.

Do you intend to sell any of your assets (Ex. Vacation property, airplane, boat, etc.)? If so, when? Please explain.

Please list all insurance policies you own including amount, term & premium (Ex. Metlife GVUL, Life Insurance, Long Term Care, LTD, etc.)

Do you have any of the following: Will, Trust, Medical Directive, Power of Attorney? If yes, please list the date they were last reviewed.

How important is it for you to leave behind an estate? If so, how much? Please explain.

Other comments:

Completed by: _____ Date: _____