



Retirement Planning Worksheet

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You Name _____

Spouse Name _____

Date of Birth _____ Currently working? Y N

Age you plan to retire _____

Currently taking Social Security benefit? Y N

If yes, age started _____ Current benefit \$ _____/mo

Monthly income desired at retirement \$ _____

Current income \$ _____ Sources _____

Anticipated future income (pension, cash rent, etc.)

\$ _____

\$ _____

Social Security benefit at Full Retirement Age \$ _____/mo

Current health _____

Family history of longevity

If it were economically beneficial, would you be willing and able to work to age 70? Y N

Assets and Liabilities:

401k's

\$ _____ Current employer? Y N

\$ _____ Current employer? Y N

Traditional/Roth IRA's

\$ _____

\$ _____

403b's/Other retirement plans

\$ _____ Current employer? Y N

\$ _____ Current employer? Y N

Anticipated inheritance or other lump sums

\$ _____

\$ _____

Other savings and accounts that could be used for income

\$ _____

\$ _____

Total Assets

(Total of all accounts above) \$ _____

Total Debt

\$ _____

Total Assets Available for Income Generation:

(Total Assets - Liabilities) \$ _____

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Please complete this retirement pre-plan worksheet and return to our office prior to your first appointment.