



Retirement Snapshot Worksheet

Personal Information

	You	Your Spouse
Name		
Date of Birth	/ / Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	/ / Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
Employment Income	\$	\$
Business Owner	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Marital Status	State of Residence	

Retirement Age

When would you like to retire? Enter your Target Retirement Age. Then, indicate how willing you are to delay retirement beyond that age, if it helps you fund your Goals.

	You	Your Spouse or partner
Target Retirement Age	Age:	Age:
How willing are you to retire later (if necessary) to attain your Goals?	<input type="checkbox"/> Not at All <input type="checkbox"/> Slightly Willing <input type="checkbox"/> Somewhat Willing <input type="checkbox"/> Very Willing	<input type="checkbox"/> Not at All <input type="checkbox"/> Slightly Willing <input type="checkbox"/> Somewhat Willing <input type="checkbox"/> Very Willing
What order of Retirement do you prefer?	<input type="checkbox"/> Both retire in the same year. <input type="checkbox"/> Either can retire first.	<input type="checkbox"/> Only you can retire first. <input type="checkbox"/> Only Client 2 can retire first.

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Identify the resources you have to fund your retirement. The Program will estimate your Living Expenses.

Social Security Benefits

	You			Your Spouse		
Are you eligible?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Receiving Now	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Receiving Now
Amount of benefit/Age	\$		<input type="checkbox"/> Use Program Estimate	\$		<input type="checkbox"/> Use Program Estimate

Retirement Income (Pension, part-time work, rental property, annuities, royalties, alimony, etc.)

Description	Owner		Monthly Amount	Yr it ends or # of Yrs	Check if amount inflates	% Survivor Benefit (Pension Only)
	1	2				
	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	

Identify all the resources you have to fund your retirement. Don't worry about determining the exact amounts, reasonable estimates are fine. If available provide your investment statements.

You

Investment Type	Current Value	Annual Additions	Approximate Allocation		
			Cash	Bond	Stock
Retirement Plans (401k, 403b)		\$ or %	%	%	%
Employer Match		\$ or %			
Traditional IRA			%	%	%
Roth IRA			%	%	%
Annuities			%	%	%
Cash Value Life Insurance			%	%	%
Taxable Accounts (Brokerage, Mutual Funds, Savings)			%	%	%

Your spouse or partner

Investment Type	Current Value	Annual Additions	Approximate Allocation		
			Cash	Bond	Stock
Retirement Plans (401k, 403b)		\$ or %	%	%	%
Employer Match		\$ or %			
Traditional IRA			%	%	%
Roth IRA			%	%	%
Annuities			%	%	%
Cash Value Life Insurance			%	%	%
Taxable Accounts (Brokerage, Mutual Funds, Savings)			%	%	%

Joint Account

Description	Current Value	Annual Additions	Approximate Allocation		
			Cash	Bond	Stock
			%	%	%
			%	%	%
			%	%	%

Other Assets (Other homes, real estate, personal property, collectables, inheritance)

Description	Owner			Current Value	Planning to sell this asset?	Year Sell / Received	Cash Received (After-tax)
	1	2	Joint				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Only If Needed		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Only If Needed		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Only If Needed		

Liabilities

Description	Owner			Current Balance	Monthly Payment	Term	Interest Rate
	1	2	Joint				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				



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