



## Retirement Pre-Plan Worksheet

**You** Name \_\_\_\_\_

**Spouse** Name \_\_\_\_\_

Date of birth \_\_\_\_\_ Currently Working? Y N  
 Anticipated retirement age \_\_\_\_\_  
 Currently taking Social Security benefit? Y N  
 If yes, age started \_\_\_\_ Current benefit \$\_\_\_\_\_/month  
 Monthly income desired at retirement \_\_\_\_\_  
 Current income \_\_\_\_\_ Sources \_\_\_\_\_  
 Anticipated future income (pension, cash, rent, etc.)  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 Social Security benefit at Full Retirement Age \$\_\_\_\_\_/month  
 Current health \_\_\_\_\_  
 Family history of longevity \_\_\_\_\_  
 If it were economically beneficial, would you be willing and  
 able to work to age 70? Y N

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

**Assets and Liabilities:**

401(k)s  
 \$ \_\_\_\_\_ Current Employer? Y N  
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 Traditional/Roth IRAs  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 403(b)s/other retirement plans  
 \$ \_\_\_\_\_ Current Employer? Y N  
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 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 \$ \_\_\_\_\_

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 (Total of all accounts above) \$ \_\_\_\_\_  
 Total Debt \$ \_\_\_\_\_

**Total Assets Available  
 for Income Generation:**

(Total Assets - Liabilities) \$ \_\_\_\_\_

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