

# My Retirement Plan

## Participant 1

## Participant 2

Name		
Current Income	\$	\$
Retirement living expenses	\$	\$
Current age		
Date of birth		
Estimated retirement age		
Life insurance face value	\$	\$
Monthly savings contributions	\$	\$

### Retirement Income Sources

### Total Value

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Pension	\$	\$
Monthly income from pension	\$	\$
PERA	\$	\$
COLA percentage		
401ks	\$	\$
403b	\$	\$
IRA	\$	\$
Other	\$	\$
Total excluding pension	\$	\$
Roth IRA	\$	\$
Cash, CDs, Savings	\$	\$
Taxable investments <i>(Mutual funds, stocks, bonds, etc.)</i>	\$	\$
Gifts or inheritance	\$	\$

Working after retirement?		
If so, expected monthly income	\$	\$
Other monthly retirement income <i>(Rentals, etc.)</i>	\$	\$
Amount to be left to beneficiaries	\$	\$

<b>Market Value</b>	<b>Mortgage</b>	<b>Sell or Hold</b>
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Primary residence	\$	\$	
Property 1	\$	\$	
Property 2	\$	\$	
Property 3	\$	\$	

Social Security Benefit			
At 62	\$	\$	
At 65	\$	\$	
At 70	\$	\$	
Inflation at retirement 1-1/2% to 3%			
Long-term care needs?			

Tax percentage			
Liquid	\$	\$	

Notes: \_\_\_\_\_

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