Retirement snapshot worksheet

Personal information

	You			Your spouse		
Name						
Date of birth	-- / -- / --	Gender	☐ Male ☐ Female	-- /-- /--	Gender	☐ Male ☐ Female
Employment income	$			$		
Business owner	Yes ☐ No ☐			Yes ☐ No ☐		
Marital status	-- Select --	State of residence		-- Select --		

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: -- Select --	Age: -- Select --
How willing are you to retire later (if necessary) to attain your goals?	☐ Not at all ☐ Slightly willing ☐ Somewhat willing ☐ Very willing	☐ Not at all ☐ Slightly willing ☐ Somewhat willing ☐ Very willing
What order of retirement do you prefer?	☐ Both retire in the same year ☐ Either can retire first	☐ Only you can retire first ☐ Only client 2 can retire first

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?	☐ Yes	☐ No	☐ Receiving now	☐ Yes	☐ No	☐ Receiving now
Amount of benefit/age	$		☐ Use program estimate	$		☐ Use program estimate

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

Description	Owner		Monthly amount	Year it ends or # of Years	Check if amount inflates	% Survivor benefit (pension only)
	1	2				
	☐	☐			☐	
	☐	☐			☐	
	☐	☐			☐	

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				
	☐	☐	☐		☐ Yes ☐ No ☐ Only If needed		
	☐	☐	☐		☐ Yes ☐ No ☐ Only If needed		
	☐	☐	☐		☐ Yes ☐ No ☐ Only If needed		

Liabilities

Description	Owner			Current balance	Monthly payment	Term	Interest rate
	1	2	Joint				
	☐	☐	☐				
	☐	☐	☐				
	☐	☐	☐				
	☐	☐	☐				