

Name: _____ Age: _____ Age of spouse: _____

1. Estimated employer benefits:

You: \$ _____ /Mo. Age start benefits: _____ Inflation adjusted: Yes No

Spouse: \$ _____ /Mo. Age start benefits: _____ Inflation adjusted: Yes No

2. Estimated Social Security benefits:

You: \$ _____ /Mo. Age start benefits: _____

Spouse: \$ _____ /Mo. Age start benefits: _____

3. Current retirement savings balance: \$ _____

Contribution: \$ _____ /Mo.

Rate of return until retirement: _____% After retirement: _____%

4. Other assets, current value: \$ _____

Rate of return until retirement: _____% After retirement: _____%

5. Estimated earned income in retirement:

You: \$ _____ /Mo. Years expect to work in retirement: _____

Spouse: \$ _____ /Mo. Years expect to work in retirement: _____

6. Other income in retirement: \$ _____ /Mo. Inflation adjusted: Yes No**7. Estimated cost of living in retirement: \$ _____ /Mo.****8. Years left before retirement: _____**

Estimated rate of inflation: _____%

Estimated tax rate in retirement for non-earned income: _____%