

# Your Tax & Retirement Planning Information

Date: \_\_\_\_\_

## About You

<p><b>Client 1</b></p> <p>Name: _____</p> <p>Current Age: _____ DOB: _____</p>	<p><b>Client 2</b></p> <p>Name: _____</p> <p>Current Age: _____ DOB: _____</p>
<p>Relationship: _____</p>	

## Your Long-Term Planning Insurance Policies

### Life Insurance Policies

Insured	Beneficiary	Death Benefit	Type	Cash Value	Premium
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$

*Life Insurance Notes*

### Long-Term Care Insurance

Insured	Type (Traditional Policy, Life Insurance Rider, Annuity Benefit)	Premium
		\$
		\$

*Long-Term Care Insurance Notes*

### Disability Insurance

Insured	Short-Term Disability Benefit	Premium	Long-Term Disability Benefit	Premium
	\$ Per Month	\$	\$ Per Month	\$
	\$ Per Month	\$	\$ Per Month	\$

*Disability Insurance Notes*

## Your Planned Retirement Date and Retirement Resources

<b>Client 1</b>	<b>Client 2</b>
Retirement Age: _____ Year: _____	Retirement Age: _____ Year: _____

## Your Retirement Income Goals in Today's Dollars

**Foundation Income Goal** (the income you need to remain comfortable during retirement): \$ \_\_\_\_\_

**Discretionary Income Goal** (the additional income to pay for fun, travel, and family): \$ \_\_\_\_\_

## Your Secure Income Sources in Retirement

Source	Recipient	Start Year or Age	End Year or Age	Monthly Amount (Pre-Tax)	Assumed Annual Increase %
Social Security			NA	\$	
Social Security			NA	\$	
Pension				\$	
Pension				\$	
Other				\$	
Other				\$	

**Your Planned Retirement Date and Retirement Resources (Continued)**

**Your Tax-Qualified Retirement Accounts**

*Tax-Qualified Retirement Accounts are accounts such as Individual Retirement Arrangements (IRA), 401(k), 403(b), 457, Thrift Savings Accounts, or similar accounts in which you saved on a pre-tax basis.*

<b>Client 1:</b>		<b>Tax-Qualified Retirement Accounts</b>		
<b>Account Name</b>	<b>Type</b>	<b>Current Value</b>	<b>Annual Contribution \$</b>	
			<i>Your Savings</i>	<i>Employer Match</i>
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

<b>Client 2:</b>		<b>Tax-Qualified Retirement Accounts</b>		
<b>Account Name</b>	<b>Type</b>	<b>Current Value</b>	<b>Annual Contribution \$</b>	
			<i>Your Savings</i>	<i>Employer Match</i>
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

**Your Other Savings Accounts**

*Cash or cash-equivalent retirement savings not held in Tax-Qualified Retirement Accounts, such as brokerage assets, bank savings, Certificates of Deposit, etc.*

<b>Account Name</b>	<b>Type</b>	<b>Value</b>	<b>Annual Contribution \$</b>
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

*Additional Information or Notes Regarding Your Retirement Savings:*

**Do you have a written retirement savings and retirement income plan?**      **YES**    **NO**

**Do you know the amount of your annual "retirement income gap?"**      **YES**    **NO**

*The annual difference, adjusted for inflation and anticipated spending changes, between your retirement income goals and what you will receive from Social Security, Pensions, and other secure income sources. This is where you spend your retirement savings.*