

Retirement Planning Assets and Income

CLIENT(S): _____ **DATE:** _____

Phone: _____ Email: _____

Home: Rent: \$ _____/month
 Own: Mortgage \$ _____/month Loan Balance \$ _____
 Year Purchased _____ Years left on loan _____
 Current Value \$ _____ Purchase Price \$ _____
 Growth rate of residence _____%

CLIENT	SPOUSE
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Assets	Current Balance	Monthly Contributions	Rate of Return	Assets	Current Balance	Monthly Contributions	Rate of Return
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Retirement Accounts	Retirement Accounts
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IRAs	\$	\$	%	IRAs	\$	\$	%
Roth IRAs	\$	\$	%	Roth IRAs	\$	\$	%
Retirement Savings Plans	\$	\$	%	Retirement Savings Plans	\$	\$	%

Personal Accounts	Personal Accounts
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Personal Savings	\$	\$	%	Personal Savings	\$	\$	%
Investments	\$	\$	%	Investments	\$	\$	%
Other	\$	\$	%	Other	\$	\$	%

Other Income	Other Income
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Earnings During Retirement	\$	From _____ To _____	Earnings During Retirement	\$	From _____ To _____
	\$	From _____ To _____		\$	From _____ To _____
Misc. Income	\$	From _____ To _____	Misc. Income	\$	From _____ To _____
	\$	From _____ To _____		\$	From _____ To _____

Effective Tax Rate _____% joint
 (Federal & State) _____% individual _____% individual

Is there anything else you would like us to know?