

Retirement Planning Assets and Income							
<b>CLIENT(S):</b>				<b>DATE:</b>			
Phone:				Email:			
Home: Rent: <input type="checkbox"/> \$ _____/month Own: <input type="checkbox"/> Mortgage \$ _____/month      Loan Balance \$ _____ Year Purchased _____      Years left on loan _____ Current Value \$ _____      Purchase Price \$ _____ Growth rate of residence _____%							
CLIENT				SPOUSE			
Assets	Current Balance	Monthly Contributions	Rate of Return	Assets	Current Balance	Monthly Contributions	Rate of Return
Retirement Accounts				Retirement Accounts			
IRAs	\$	\$	%	IRAs	\$	\$	%
Roth IRAs	\$	\$	%	Roth IRAs	\$	\$	%
Retirement Savings Plans	\$	\$	%	Retirement Savings Plans	\$	\$	%
Personal Accounts				Personal Accounts			
Personal Savings	\$	\$	%	Personal Savings	\$	\$	%
Investments	\$	\$	%	Investments	\$	\$	%
Other	\$	\$	%	Other	\$	\$	%
Other Income				Other Income			
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?							