Multi-Discipline Retirement Planner

Retirement Happens....Are You Ready?

Use this planner on your own or with your advisor to gather all of your important retirement data and information.

Name:____Date:_________________

RETIREMENT INCOME NEEDS*

Your Total Income:____

Minus FICA____ _

Retirement Contribution____

Other Retirement Savings____

Misc. Expenses____

MONTHLY EXPENSES

Expenses Eliminated at Retirement:

1.______________________________ 2.______________________________

3.______________________________ 4.______________________________

5.______________________________ 6.______________________________

INCOME DISTRIBUTION

When will you start taking distributions?________________________________
Where will you withdraw funds from?__________________________________
What is the percent of distribution you will need?________________________
How long will your savings last based on longevity?_________________________

*Your Retirement Advisor recommends that you run (or have your advisor run a Retirement Efficiency Assessment to project how much and how long your money will last in retirement. All of your needs, income (including pensions and Social Security) costs for health care and long term care MUST be a part of this analysis. If you would like a Your Retirement Advisor affiliated advisor to run this analysis for you, please contact us at: info@yourretirementadvisor.com or 508.798.5115

SOCIAL SECURITY

Your Life Expectancy:_________________ Social Security Starts at age:________
Your Full Retirement Age:_____________ Your Benefit Amount:_____________

	Your Benefit Amt.	Spousal Benefit Amt.
Social Security Income at:		
Age 62	_______________	_________________
Full retirement age	_______________	
Age 70	_______________	_________________
		_________________

File and Suspend? Yes_____ No______

INVESTMENTS

Risk Profile:____

Current Allocation:____

Suggested Allocation:____

TAX CONSIDERATIONS

1:____

2.____

3.____

RISK & INSURANCE

Long term care:____

Medicare:____

Umbrella policy:____

Term life insurance:____

Your Retirement Advisor - www.YourRetirementAdvisor.com – 978.345.7075 – info@yourretirementadvisor.com

ESTATE PLANNING

Have you established a will?

Do you have a Living Revocable Trust?_

Date last reviewed?_

NOTES

Should you require any help with this planner or you're interested in a complimentary assessment in any one or all of these areas, please contact us via any of the methods listed below.