



## Multi-Discipline Retirement Planner

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

NAME:	DATE:
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### 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 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.



## SOCIAL SECURITY

Your Life Expectancy: \_\_\_\_\_ Social Security Starts at age: \_\_\_\_\_

Your Full Retirement Age: \_\_\_\_\_ Your Benefit Amount: \_\_\_\_\_

	<u>Your Benefit Amt.</u>	<u>Spousal Benefit Amt.</u>
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: \_\_\_\_\_



**ESTATE PLANNING**

Have you established a will? \_\_\_\_\_

Do you have a Living Revocable Trust? \_\_\_\_\_

Date last reviewed? \_\_\_\_\_

NOTES:

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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.

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