



RETIREMENT

ELEVATED

Plan Well, Retire Well, Live Well

Identify existing and potential sources of income and assets.

List the income sources you will use to fund your retirement, as well as any assets and accounts you may have that could be converted into income.

| INCOME | Description of Source of Income <i>(including start & end dates)</i> | Monthly Income | |
|----------------|---|----------------|--------|
| | | You | Spouse |
| Annual Income | | \$ | \$ |
| Social | | \$ | \$ |
| Pension Plans | | \$ | \$ |
| Annuity Income | | \$ | \$ |
| Rental Income | | \$ | \$ |
| Other | | \$ | \$ |
| Total: | | \$ | \$ |

| ASSETS | Description of Assets <i>(location, percent of stocks or bonds)</i> | Invested Assets | |
|----------------------------|--|-----------------|--------|
| | | You | Spouse |
| Employer-Sponsored Savings | | \$ | \$ |
| Traditional IRAs | | \$ | \$ |
| Taxable Mutual Funds | | \$ | \$ |
| Tax-deferred Annuities | | \$ | \$ |
| Savings Accounts | | \$ | \$ |
| Other | | \$ | \$ |
| Total: | | \$ | \$ |

| OTHER INCOME | Description of Income <i>(including start & end dates)</i> | Other Income | |
|---------------|---|--------------|--------|
| | | You | Spouse |
| Real Estate | | \$ | \$ |
| Inheritance | | \$ | \$ |
| Stock Options | | \$ | \$ |
| Other | | \$ | \$ |
| Total: | | \$ | \$ |