

RETIREMENT WORKSHEET

TAX YEAR: _____

INCOME

PRIMARY INCOME: _____

SPOUSE INCOME: _____

SOCIAL SECURITY: _____

SPOUSE SOCIAL SECURITY: _____

OTHER INCOME: _____

SECONDARY INCOME: _____

RETIREMENT ASSESTS

PENSION PLAN: _____

QUALIFIED PLAN, 401(K), 403(B),457(B),etc: _____

ROTH IRA: _____

TRADITIONAL IRA: _____

ANNUITIES: _____

OTHER: _____

INVESTMENT ASSETS

STOCKS: _____

MUTUAL FUNDS: _____

TREASURIES: _____

BONDS: _____

CASH: _____

CD'S: _____

REAL ESTATE: _____

OTHER: _____