

ESTIMATED RETIREMENT INCOME

I. Planned Retirement Age: You _____ Your Spouse _____

II. Estimated Monthly Retirement Income Desired

1. For you (and your spouse) \$ _____

2. For your surviving spouse \$ _____

III. Sources of Estimated Monthly Retirement Income Available to You (and Your Spouse)

Source	Age When the Income Is to begin	Income For you (and your Spouse)--- amount and dura- tion (if not for life)	Continuing income for your sur- viving spouse--- amount and dura- tion (if not for life)
A. Social security retirement benefits	_____	\$ _____	\$ _____
B. Other government benefits	_____	_____	_____
C. Pension plan	_____	_____	_____
D. Savings or profit-sharing plan	_____	_____	_____
E. Nonqualified deferred compensation	_____	_____	_____
F. Other employee benefits	_____	_____	_____
G. HR-10 plans	_____	_____	_____
H. Individual retirement annuity or account (IRA)	_____	_____	_____
I. Tax-sheltered annuity (TSA) plan	_____	_____	_____
J. Nonqualified individual annuities (fixed-dollar and variable)	_____	_____	_____
K. Life insurance cash values and the estimated value of any accumulated dividends	_____	_____	_____

III. Sources of Estimated Monthly Retirement Income Available to You (and Your Spouse) (continued)

Source	Age When the Income Is to begin	Income For you (and your Spouse)--- amount and dura- tion (if not for life)	Continuing income for your sur- viving spouse--- amount and dura- tion (if not for life)
L. Estimated investment income from your (and your spouse's) general investment fund, projected at a reasonable rate of return to your planned retirement age	_____	_____	_____
M. Estimated investment income from any expected inheritances	_____	_____	_____
N. Proceeds from any sale or liquidation of a business interest at or during retirement	_____	_____	_____
O. Proceeds from any other planned liquidation of assets during retirement	_____	_____	_____
P. Other sources of retirement income	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Totals		\$_____	\$_____

IV. Control of Your Estimated Retirement Income

How much of the above sources of retirement income would you retain (control) if you took an action such as changing jobs (e.g., social security, vested rights in pension and profit-sharing plans, etc.)?

For you (and you spouse) \$_____

For your surviving spouse \$_____

V. What, If Any, Additional Retirement Income (or Guarantees) Do You (or Your Spouse) Need to Meet Your Objectives?

Possible sources	Amounts
_____	\$ _____
_____	\$ _____
_____	\$ _____