FINDING YOUR
ENOUGH NUMBER
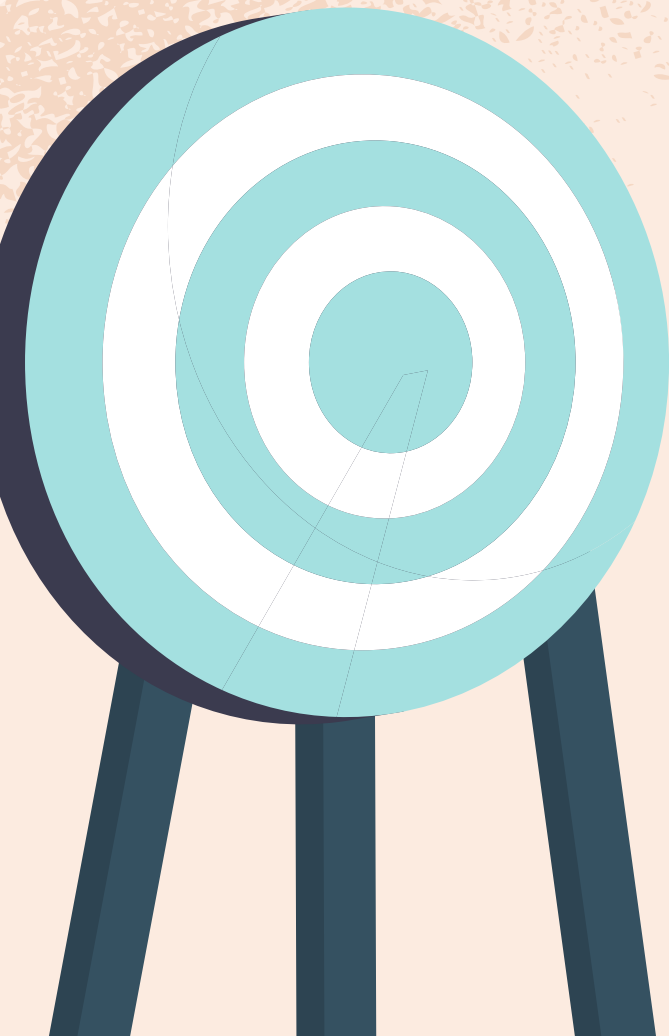
RETIREMENT PLANNING ORGANIZER

CONFIDENTIAL INFORMATION OF:

_____

_____
Date updated

When it comes to planning for retirement, many individuals and couples wonder how much will be enough. In order to answer this question, it's important to first understand your current circumstances. Only then can you identify and implement strategies for protecting your accumulated wealth and creating an income plan that meets your needs even as your life unfolds and your circumstances change. With the help of a trusted advisor, you can hit the bullseye in retirement planning at every stage of life.

PERSONAL INFORMATION

SPOUSE ONE

_____   _____
Full name   Date of birth *(MM/DD/YYYY)*

_____   _____   _____
Home phone   Work phone   Mobile phone

_____   _____
Personal email   Work email

_____   _____
Employer   Employer phone

_____   _____   _____   _____
Work address   City   State   ZIP

_____   _____   _____
Occupation   Industry   Retirement date *(or expected)*

SPOUSE TWO

_____   _____
Full name   Date of birth *(MM/DD/YYYY)*

_____   _____   _____
Home phone   Work phone   Mobile phone

_____   _____
Personal email   Work email

_____   _____
Employer   Employer phone

_____   _____   _____   _____
Work address   City   State   ZIP

_____   _____   _____
Occupation   Industry   Retirement date *(or expected)*

Filing status ☐ Single ☐ Married filing jointly ☐ Married filing separately

_____   _____
If married, date of marriage *(MM/DD/YYYY)*   Number of dependents

_____   _____   _____   _____
Home address   City   State   ZIP

_____   _____   _____   _____
Mailing address *(if different from above)*   City   State   ZIP

CHILDREN

_____ _____
Child one name   Date of birth *(MM/DD/YYYY)*

_____ _____
Child two name   Date of birth *(MM/DD/YYYY)*

_____ _____
Child three name   Date of birth *(MM/DD/YYYY)*

_____ _____
Child four name   Date of birth *(MM/DD/YYYY)*

EDUCATION

_____ _____ _____
Start date   Number of years   Place of education

_____ _____ _____
Start date   Number of years   Place of education

_____ _____ _____
Start date   Number of years   Place of education

_____ _____ _____
Start date   Number of years   Place of education

INCOME SOURCES

$_____ $_____
Spouse one salary   Spouse one bonus *(yearly average)*

$_____ $_____
Spouse two salary   Spouse two bonus *(yearly average)*

$_____   _____
Spouse one Social Security   Spouse one Social Security start date *(MM/DD/YYYY)*

$_____   _____
Spouse two Social Security   Spouse two Social Security start date *(MM/DD/YYYY)*

$_____   _____
Pension income   Source

$_____   _____ _____
Deferred compensation   Start date   Stop date

$_____ $_____
Rental income   Other

Additional information: _____

_____

PERSONAL PROPERTY (homes, rental properties, raw land, artwork, automobiles, etc.)

Description	Owner	Market value	Cost basis	Annual taxes	Annual growth %

LIABILITIES

Description	Borrower	Type	Lender	Interest rate	Balance	Payment	Payoff date

ACCOUNTS (IRA, Roth IRA, 401(k), profit sharing, pension lump sum, brokerage, bank, CD, money market, etc.)

Name(s)	Current value	Cost basis	Custodian/bank	Annual contribution

Additional information: _____

_____

_____

EMPLOYER BENEFITS

Retirement plan/employer match _____% on _____%   Profit sharing (yearly average) $_____

Stock options (details)_____

INSURANCE POLICIES (life, disability, long-term care, annuities, etc.)

Type	Owner	Insured	Term	Benefit	Premium/year

ESTATE PLANNING DOCUMENTS

BASIC ESTATE DOCUMENTS

Will and testament ☐ No ☐ Yes _____   Durable POA ☐ No ☐ Yes _____
                              Date created   Date created

Living will ☐ No ☐ Yes _____   Healthcare POA ☐ No ☐ Yes _____
                       Date created   Date created

OTHER ESTATE DOCUMENTS

Revocable trust ☐ No ☐ Yes _____   Credit shelter trust ☐ No ☐ Yes _____
                           Date created   Date created

Trust under will ☐ No ☐ Yes _____   Irrevocable trust ☐ No ☐ Yes _____
                            Date created   Date created

PROFESSIONALS

_____   _____
Attorney name   Phone

_____   _____
Estate attorney name   Phone

_____   _____
CPA/accountant name   Phone

_____   _____
Insurance agent name   Phone

NOTES