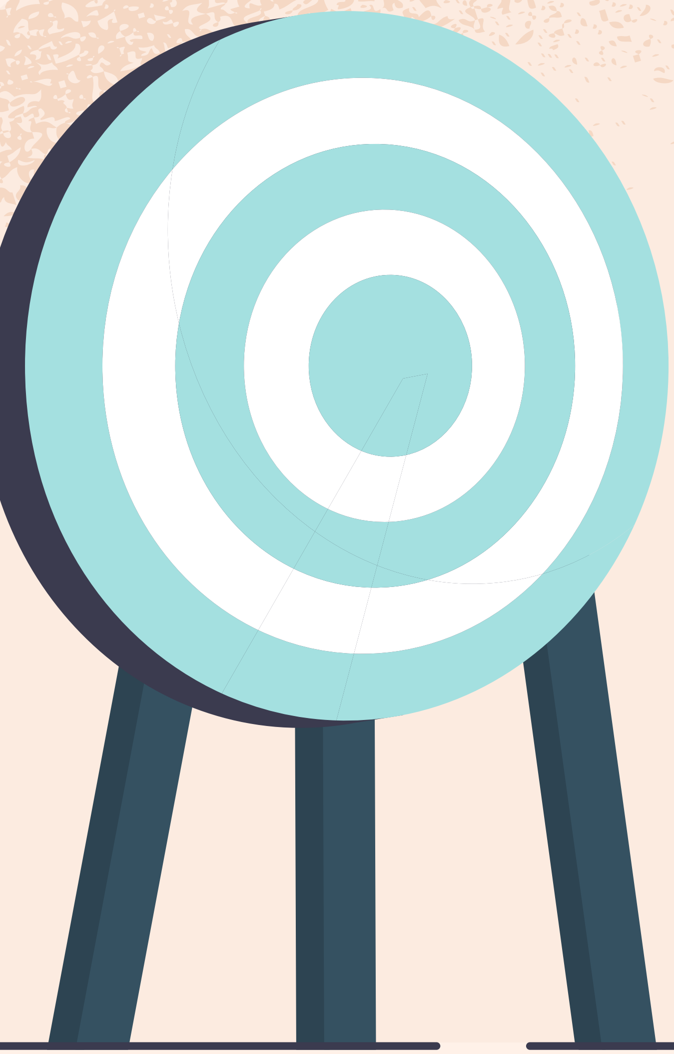
FINDING YOUR ENOUGH NUMBER

RETIREMENT PLANNING ORGANIZER



CONFIDENTIAL INFORMATION OF:

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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.

FIVE RINGS FINANCIAL

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: ______________________________

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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 ______________________ Date created

Durable POA ☐ No ☐ Yes ______________________ Date created

Living will ☐ No ☐ Yes ______________________ Date created

Healthcare POA ☐ No ☐ Yes ______________________ Date created

OTHER ESTATE DOCUMENTS

Revocable trust ☐ No ☐ Yes ______________________ Date created

Credit shelter trust ☐ No ☐ Yes ______________________ Date created

Trust under will ☐ No ☐ Yes ______________________ Date created

Irrevocable trust ☐ No ☐ Yes ______________________ Date created

PROFESSIONALS

______________________ Attorney name   ______________________ Phone

______________________ Estate attorney name   ______________________ Phone

______________________ CPA/accountant name   ______________________ Phone

______________________ Insurance agent name   ______________________ Phone

NOTES