

CLIENT NAME		SPOUSE NAME	
CLIENT AGE	OR	DOB	/ /
SPOUSE AGE	OR	DOB	/ /
GROSS ANNUAL RETIREMENT INCOME DESIRED		\$	/ YEAR
NUMBER OF YEARS TO DEFER	OR	YEAR OF RETIREMENT	

PLANNED SOURCES OF GUARANTEED RETIREMENT INCOME

SOURCE	ANNUAL INCOME
	\$
	\$
	\$
	\$
	\$
	\$
	\$

TOTAL PLANNED GUARANTEED RETIREMENT INCOME \$

ANNUAL INCOME GAP (IF ANY) \$

(Gross annual retirement income desired - Total planned guaranteed retirement income)

CURRENT ASSETS - FINANCIAL PORTFOLIO

ASSETS	AMOUNT
	\$
	\$
	\$
	\$
	\$
	\$

TOTAL CURRENT ASSETS - FINANCIAL PORTFOLIO \$