

My Retirement Financial Organizer

Keep track of your accounts, policies and income in one place.

Prepared for:

Date:

Last Updated:

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RETIREMENT ACCOUNTS

Include 401(k)s, 403(b)s, IRAs, Roth IRAs or other retirement accounts.

Account Type	Institution	Account Name (e.g. Traditional IRA)	Owner (You, Spouse, Joint)	Notes (e.g. beneficiary, RMDs)

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ANNUITIES

Include fixed, indexed or income annuities.

Insurance Company	Policy Type (Fixed, Indexed, Income, etc.)	Owner (You, Spouse, Joint)	Issue Date	Notes (e.g. benefit type, rider)

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LIFE INSURANCE

Include term, whole life, universal life or other policies.

Insurance Company	Policy Type (Term, Whole, Universal, etc.)	Owner (You, Spouse, Joint)	Face Amount	Notes (e.g. beneficiary)

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BANK ACCOUNTS & CDS

Include savings, money market accounts, CDs or other bank accounts.

Institution	Account Type (Checking, Saving, CD, etc.)	Account Name	Owner (You, Spouse, Joint)	Notes (e.g. maturity date)

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Income Sources & Expected Retirement Income

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SOCIAL SECURITY

Include your estimated monthly benefit and the age you plan to start.

Name	Estimated Monthly Benefit	Planned Start Age	Notes (e.g. strategy, spousal benefit)

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PENSIONS

Include traditional pensions, military pensions or other lifetime income.

Source / Employer	Estimated Monthly Benefit	Start Date	Type (Lifetime, Joint, etc.)	Notes

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ANNUITY INCOME

Include immediate or deferred annuities you expect to use for income.

Insurance Company	Estimated Monthly Income	Start Date	Type (Fixed, Indexed, etc.)	Notes

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OTHER INCOME SOURCES

Include rental income, part-time work, dividends, interest or other expected income.

Source	Estimated Monthly Income	Start Date	Frequency (Monthly, Annual, etc.)	Notes

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Your Financial Snapshot & Next Steps

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ESTIMATED MONTHLY INCOME SUMMARY

Income Source	Estimated Monthly Amount
Social Security	
Pension(s)	
Annuity Income	
Retirement Accounts (Withdrawals)	
Investment Income (Dividends, Interest, etc.)	
Rental or Other Income	
Total Estimated Monthly Income	

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KEY ITEMS TO REVIEW

☐ Have I reviewed all account beneficiaries?

☐ Do my accounts and policies align with my goals?

☐ Have I considered required minimum distributions (RMDs)?

☐ Have I identified retirement-related tax questions to discuss with a qualified tax professional?

☐ Do I have enough liquidity for unexpected expenses?

☐ Have I coordinated with my spouse and/or family?

☐ Is my overall plan on track with my retirement timeline?

☐ Other:

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IMPORTANT NOTES & QUESTIONS

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MY NEXT STEPS

What do I want to do next?

1.

2.

3.