

RETIREMENT FACT FINDER

Financial data as of: _____

Contact phone: _____

Name: _____

Birth date: _____

Spouse: _____

Birth date: _____

ASSETS

Residence: _____

Cash accounts: _____

Stocks & Bonds: (not IRAs or Qualified Plans)

Real estate investment(s): _____

Other investments: _____

Estimated Value of Practice: _____

Accounts Receivable in Above: _____

Retirement Plan Account Value: _____

IRAs: _____

Other assets: _____

TOTAL ASSETS: _____

LIABILITIES

Residence mortgage: _____

Other mortgages: _____

Margin acct: (if applicable) _____

Other liabilities: _____

TOTAL LIABILITIES: _____

NET WORTH: _____

CASH ADDITIONS TO INVESTMENT ACCOUNTS

Annual contributions to pension and/or IRAs: _____

Monthly contributions to other Long Term investment acct(s): _____

RETIREMENT PLANNING PROJECTIONS

Estimated age for retirement

First Date: _____

Alternate Date: _____

Projected monthly income requirement:

\$ _____

NOTES

PROJECTED MONTHLY INCOME RQUIRED

HOUSING COSTS

Mortgage Payments	\$ _____	
Utilities	\$ _____	
Insurance	\$ _____	
Maintenance	\$ _____	
Total Housing Costs		\$ _____

TRANSPORTATION

Car Payments	\$ _____	
Repairs	\$ _____	
Other	\$ _____	
Total Transportation		\$ _____

FOOD

Groceries	\$ _____	
Supplies	\$ _____	
Total Food		\$ _____

HEALTH CARE

Insurance	\$ _____	
Prescriptions	\$ _____	
Medical Costs	\$ _____	
Dental Costs	\$ _____	
Other	\$ _____	
Total Health Care		\$ _____

ENTERTAINMENT

TRAVEL

CLOTHING

OTHER

TOTAL MONTHLY INCOME REQUIRED

\$ _____
\$ _____
\$ _____
\$ _____
\$ _____
\$ _____

Feel free to contact Donald R. Laird at Watkinson Laird Rubenstein Baldwin & Burgess, P.C., at (541) 484-2277 in Eugene, (541) 673-5528 in Roseburg, (541) 923-8767 in Redmond, or (541) 757-1365 in Corvallis for further information.

