Income Planning

Retirement will change your life in profound ways. One of the most basic aspects of retirement is obvious: you will no longer be receiving an annual salary. But just because you're retired does not mean that you will stop receiving monthly paychecks. From social security payments to bond yields, you will be earning a regular income. To determine the value of that income, we recommend that you take the time to fill out the worksheet below.

Current Occupational Income

Salary: $_____

Pension: $_____

401(k)/403(b): $_____

Profit-Sharing Plan (PSP): $_____

Social Security: $_____

SEP/SIMPLE: $_____

TSA: $_____

Rental Income: $_____

Other: $_____

Other: $_____

Total: $ 0 _____

Investment Income

Equity Dividends: $_____

Bond Yields: $_____

Bonds Due: $_____

Mutual Fund Interest: $_____

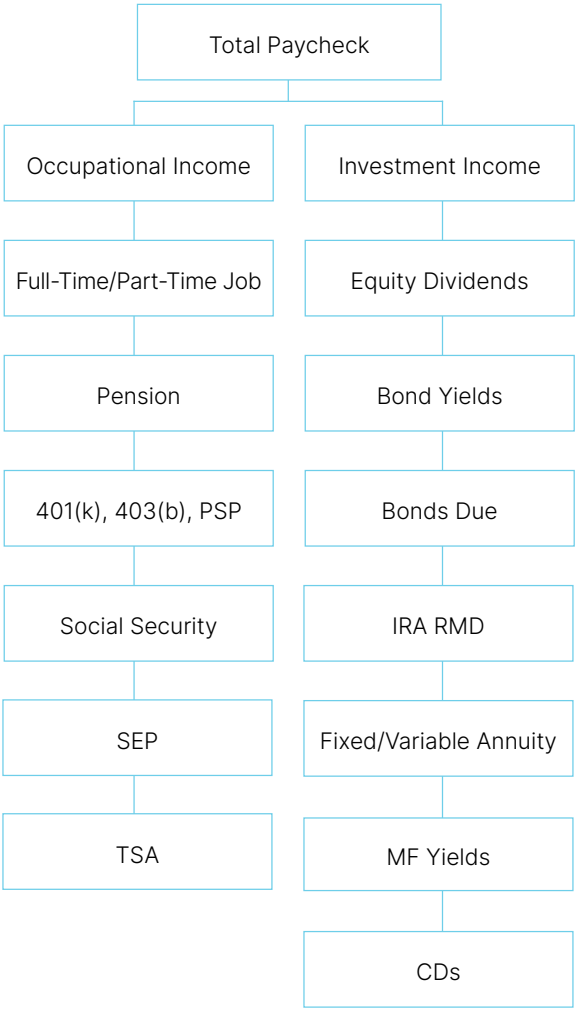
IRA RMD: $_____

Fixed/Variable Annuity: $_____

CDs: $_____

Other: $_____

Total: $ 0 _____



Occupational Income + Investment Income = $ 0 _____

Notes or information that may affect the total income worksheet: _____

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