Retirement Plan Inventory

Presented by: Your Financial Advisor

Prepared for: ____________________

Employer-Sponsored Retirement Plans

	Plan 1	Plan 2
Company		
Plan Type (Defined Benefit, Money Purchase, Profit Sharing, 401(k), SEPP, TDA, Deferred Compensation)		
Value as of ___________	$	$
Account Number		
Benefits Manager		
Telephone Number		
Payout Provisions	○ Lump Sum or ○ Annuity: ○ Life Only ○ Life _____ Years Certain ○ Joint and _____% Survivor	○ Lump Sum or ○ Annuity: ○ Life Only ○ Life _____ Years Certain ○ Joint and _____% Survivor

Personal Retirement Plans

	Plan 1	Plan 2
Bank or Brokerage		
Plan Type (Regular IRA, Roth IRA, Keogh, Personal Non-Qualified Savings)		
Value as of ___________	$	$
Account Number		
Bank Officer or Broker		
Telephone Number		
Payout Provisions	○ Lump Sum or ○ Annuity: ○ Life Only ○ Life _____ Years Certain ○ Joint and _____% Survivor	○ Lump Sum or ○ Annuity: ○ Life Only ○ Life _____ Years Certain ○ Joint and _____% Survivor