



MARC OSLAR RETIREMENT EXPERIENCE

PHONE | (919) 678-2566

FAX | (919) 481-3342

EMAIL | marc@moretoretire.com

WEB | www.moretoretire.com

OFFICE | 919 Kildaire Farm Road, Suite 1-B, Cary, NC 27511

Retirement Pre-Plan Worksheet

You Name _____

Date of birth _____ Currently Working? Y N
Anticipated retirement age _____
Currently taking Social Security benefit? Y N
If yes, age started ____ Current benefit \$_____/month
Monthly income desired at retirement _____
Current income _____ Sources _____
Anticipated future income (pension, cash, rent, etc.)
\$ _____
\$ _____
Social Security benefit at Full Retirement Age \$_____/month
Current health _____
Family history of longevity _____
If it were economically beneficial, would you be willing and
able to work to age 70? Y N

Assets and Liabilities:

401(k)s
\$ _____ Current Employer? Y N
\$ _____ Current Employer? Y N
Traditional/Roth IRAs
\$ _____
\$ _____
403(b)s/other retirement plans
\$ _____ Current Employer? Y N
\$ _____ Current Employer? Y N
Anticipated inheritance or other lump sums
\$ _____
\$ _____
Other savings and accounts that could be used for income
\$ _____
\$ _____
Total Assets
(Total of all accounts above) \$ _____
Total Debt \$ _____

Total Assets Available for Income Generation:

(Total Assets - Liabilities) \$ _____

Spouse Name _____

Date of birth _____ Currently Working? Y N
Anticipated retirement age _____
Currently taking Social Security benefit? Y N
If yes, age started ____ Current benefit \$_____/month
Monthly income desired at retirement _____
Current income _____ Sources _____
Anticipated future income (pension, cash, rent, etc.)
\$ _____
\$ _____
Social Security benefit at Full Retirement Age \$_____/month
Current health _____
Family history of longevity _____
If it were economically beneficial, would you be willing and
able to work to age 70? Y N

Assets and Liabilities:

401(k)s
\$ _____ Current Employer? Y N
\$ _____ Current Employer? Y N
Traditional/Roth IRAs
\$ _____
\$ _____
403(b)s/other retirement plans
\$ _____ Current Employer? Y N
\$ _____ Current Employer? Y N
Anticipated inheritance or other lump sums
\$ _____
\$ _____
Other savings and accounts that could be used for income
\$ _____
\$ _____
Total Assets
(Total of all accounts above) \$ _____
Total Debt \$ _____

Total Assets Available for Income Generation:

(Total Assets - Liabilities) \$ _____

Please complete this retirement pre-plan worksheet and return to our office prior to your first appointment. Investment advisory products and services made available through Impact Partnership Wealth, LLC ("IPW"), a Registered Investment Adviser. 4299036-03/25