

## Retirement Plan Inventory

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	<input type="checkbox"/> Lump Sum or <input type="checkbox"/> Annuity: <input type="checkbox"/> Life Only <input type="checkbox"/> Life ____ Years Certain <input type="checkbox"/> Joint and ____% Survivor	<input type="checkbox"/> Lump Sum or <input type="checkbox"/> Annuity: <input type="checkbox"/> Life Only <input type="checkbox"/> Life ____ Years Certain <input type="checkbox"/> 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	<input type="checkbox"/> Lump Sum or <input type="checkbox"/> Annuity: <input type="checkbox"/> Life Only <input type="checkbox"/> Life ____ Years Certain <input type="checkbox"/> Joint and ____% Survivor	<input type="checkbox"/> Lump Sum or <input type="checkbox"/> Annuity: <input type="checkbox"/> Life Only <input type="checkbox"/> Life ____ Years Certain <input type="checkbox"/> Joint and ____% Survivor