

# Retirement Plan Inventory

Presented by:



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