

Your Financial Snapshot, Today

	You	Spouse	Total
Birth Year -			
Income -			\$0
Value of all Retirement, Savings, Checking Accounts -			\$0
Liquid Amount (Checking, Roth Basis, HSA Callable) -			\$0
Annual Savings Dollars (Household & Employer) -			\$0
Savings Rate as % of Income (Includes Employer) -	0.0%	0.0%	0.0%
Monthly Social Security Estimate (62) -	\$0	\$0	\$0
Monthly Social Security Estimate (70) -	\$0	\$0	\$0
Real Estate Market Value -			
Mortgage Balances -			
Sum of all other Debt -			
Other Assets			
Life Insurance Death Benefit Amount -			\$0
Long-Term Disability Income Replacement -			0%

Your Financial Opportunities, Today

	You	Spouse
Employer Match of -		
On Percent of Pay up to -		
Additional Employer Contributions -		
Employer Plan Compensation -		
Roth 401(k) Available -		
HDHP Coverage -		
Career Path -		
Investment Style -		

Your Financial Goals, Tomorrow

Target Financially Independent Age -			
Financially Independent Lifestyle -			
Chance of Assets Surviving -			
	You	Spouse	Total
Other Income (Annual & Future Dollar) -	\$0	\$0	\$0
Other Income (Annual & Current Dollar) -	\$0	\$0	\$0

Your Financial Snapshot, *Today*

- Birth Year - The year you were born
- Income - The amount generally reported on your annual w-2
- Value of all Retirement, Savings, Checking Accounts - All amount of money that is in a bank account
- Liquid Amount (Checking, Roth Basis, HSA Callable) - The amount from above that is accessible with penalties or taxes
- Annual Savings Dollars (Household & Employer) - The total dollar amount saved annually, including company contributions
- Savings Rate as % of Income (Includes Employer) -
 - Monthly Social Security Estimate (62) -
 - Monthly Social Security Estimate (70) -
- Real Estate Market Value - The value your real estate would sell for
- Mortgage Balances - Any amount of debt on your real estate
- Sum of all other Debt - All debt other than mortgage
- Other Assets - Any other assets, like business ownership
- Life Insurance Death Benefit Amount - The amount your life insurance pays upon death
- Long-Term Disability Income Replacement - 60% is common if you have a policy

Your Financial Opportunities, *Today*

- Employer Match of - Usually \$0.50 or \$1 of the \$1 you save
- On Percent of Pay up to - Usually up to 3% or 6% of what you save
- Additional Employer Contributions - Does your company give year end profit sharing contributions?
- Employer Plan Compensation - Usually only base pay is plan eligible, but sometimes bonuses are too
- Roth 401(k) Available - Does your plan have a roth option
- HDHP Coverage - Are you covered by a high-deductible health plan? Single or Family?
- Career Path -
- Investment Style -

Your Financial Goals, *Tomorrow*

- Target Financially Independent Age - At what age do you want to be free from working?
- Financially Independent Lifestyle - Do you plan to spend more, less, or the same in retirement?
- Chance of Assets Surviving -

- Other Income (Annual & Future Dollar) -
- Other Income (Annual & Current Dollar) -