



## Retirement Needs Analysis



### Retirement Income

Projected Plan 3/Other Assets Balance:	
Projected annual income goal at retirement:	

## Assumptions

### The following assumptions were used for Retirement Analysis:

Current age:		Pre-retirement rate of return:	0%
Retirement age:		Post-retirement rate of return:	0%
Years in Retirement:		Annual inflation rate:	0%
Current annual salary:		Marital Status	Married
Annual salary increase:	0%	Social Security start age:	
Number of Paycheck per year:		Social Security benefit (at start age):	
Current retirement savings:		Pension benefit first year of retirement:	
Retirement income goal (percent of current salary):	0%	Cost of living adjustment for pension benefit:	0%
Pre-tax contribution (per paycheck):			

### Other Assets:

Tax deferred savings balance at retirement:	
Tax free savings balance at retirement:	
Taxable savings balance at retirement:	
Monthly pension amount at retirement:	
Monthly income from another source (part-time job, rental property, etc.):	

Current and future maximum contributions are based on current IRS restrictions.

These hypothetical returns are for illustration purposes only, to demonstrate compounding, and do not represent the performance of any specific product or investment. Actual returns will fluctuate with changes in market conditions. These illustrations are based on information provided by the participant.

This calculator is provided for educational purposes only and does not serve as legal, financial or tax advice. You should always consult with your financial planner, attorney and/or tax advisor as needed.

Results and analyses are based on information provided by you and no assumptions are made as to your particular situation. Projections are hypothetical and are not guaranteed. All investments carry a degree of risk and past performance is not a guarantee of future results. Asset allocation and diversification do not ensure a profit and do not protect against loss in declining markets. You should discuss reallocation of funds, potential fees and investment options with your financial advisor.