

ESTIMATING YOUR ANNUAL RETIREMENT INCOME

Social Security

Contact your local Social Security Office to determine your annual anticipated benefit.

Pensions and Employer-Sponsored Benefits

Contact your Human Resources manager to determine your annual anticipated benefits.

Pension Plan

401(k) Plan

Profit Sharing Plan

Deferred Pay

Stock Options

Other

Savings and Investments

Contact your investment advisor/financial planner to determine your annual anticipated benefits.

IRA

Keogh Account

Savings Account (include interest)

Money Market Account (include interest)

Treasury Bonds

Mutual Funds

Bond Dividends

Stock Dividends

Stock Available for Sale

Annuities

Other

Estimated Annual Retirement Income
