

What you'll get in your complimentary Retirement Financial Plan:



Strategies to safeguard your hard-earned retirement savings



Tax analysis to see where you can save on taxes in your retirement



Comprehensive retirement income plan



Portfolio analysis to help protect you from running out of money in retirement

Fill out the worksheet on the next page and submit it to our secure file-sharing link below. Call our office at **(610) 440-1700** if you need assistance getting started.

bit.ly/ABWFupload

**MONEY
MATTERS**



Investment advisory services offered through A Better Way Financial, LLC, A registered investment advisor. Insurance and annuities offered through Frank Guida and Frank Guida Jr. PA insurance licenses #301779 and #932281





"Empowering Your Retirement Dreams"

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Retirement Pre-Plan Worksheet

You Name _____

Spouse Name _____

Date of birth _____ Currently Working? Y N
Anticipated retirement age _____
Currently taking Social Security benefit? Y N
If yes, age started ____ Current benefit \$_____/month
Monthly income desired at retirement _____
Current income _____ Sources _____
Anticipated future income (pension, cash, rent, etc.)
\$ _____
\$ _____
Social Security benefit at Full Retirement Age \$_____/month
Current health _____
Family history of longevity _____
If it were economically beneficial, would you be willing and able to work to age 70? Y N

Assets and Liabilities:

401(k)s
\$ _____ Current Employer? Y N
\$ _____ Current Employer? Y N
Traditional/Roth IRAs
\$ _____
\$ _____
403(b)s/other retirement plans
\$ _____ Current Employer? Y N
\$ _____ Current Employer? Y N
Anticipated inheritance or other lump sums
\$ _____
\$ _____
Other savings and accounts that could be used for income
\$ _____
\$ _____
Total Assets
(Total of all accounts above) \$ _____
Total Debt \$ _____
Total Assets Available for Income Generation:
(Total Assets - Liabilities) \$ _____

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