

# 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 make sure you won't run 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](https://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

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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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### Total Assets Available for Income Generation:

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