

RETIREMENT ACCOUNTS

Retirement
Accounts

Building today for a more secure tomorrow.

“A brighter tomorrow is built on the choices you make today.”

EMPLOYER RETIREMENT PLANS

List any retirement plans through current or former employers.

Employer Name	Plan Type (401(k), 403(b), Pension, etc.)	Account Number (last 4 digits)	Current Balance (approximate)	Vesting Status (Vested / Not Vested)	Contact Information (Phone / Website)	Notes

INDIVIDUAL RETIREMENT ACCOUNTS (IRAs)

List any personal retirement accounts.

Financial Institution	Account Type (Traditional, Roth, SEP, SIMPLE, etc.)	Account Number (last 4 digits)	Current Balance (approximate)	Contact Information (Phone / Website)	Notes

HSA, 529 & OTHER TAX-ADVANTAGED ACCOUNTS

Taxable brokerage accounts: see page 26.

Financial Institution	Account Type (HSA, 529, ABLE, etc.)	Account Number (last 4 digits)	Current Balance (approximate)	Contact Information (Phone / Website)	Notes

ANNUITIES

List any annuities you own.

Insurance Company	Type of Annuity (Fixed, Indexed, Variable, etc.)	Contract Number (last 4 digits)	Current Value (approximate)	Notes

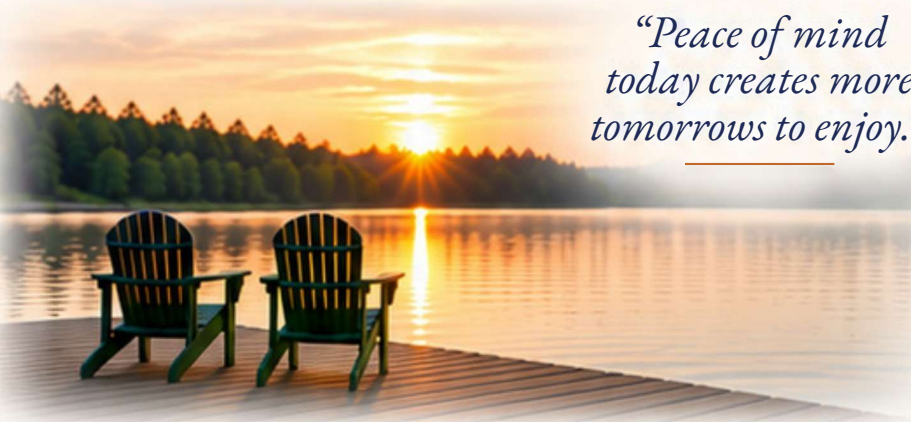
PENSIONS & OTHER INCOME

List any pensions, deferred compensation, or other retirement income sources.

Source / Company	Type (Pension, Deferred Comp, etc.)	Estimated Monthly Income	Contact Information	Notes

ADDITIONAL NOTES

Use this space for any additional information, questions, or reminders.



GAVREL FAMILY PLANNING KIT

**This worksheet is from the
Gavrel Family Planning Kit.**

Get the full kit free at

GavrelGuidance.com

Honor Your Past. Protect Your Present. Prepare Your Future.