



Retirement Plan

What do you want to retire with?		
Minimum Retirement Scenerio	Current Age:	Expected Retirement Age:
	Current Amount in Fund (\$):	Expected Annual Rate of Return:
	Desired Fund Balance at Retirement:	Desired Income at Retirement:
	Annual Contribution according to Calculator:	
Ideal Retirement Scenerio	Current Age:	Expected Retirement Age:
	Current Amount in Fund (\$):	Expected Annual Rate of Return:
	Desired Fund Balance at Retirement:	Desired Income at Retirement:
	Annual Contribution according to Calculator:	

What are you currently doing?		
Savings 1	Account Name:	Account Type: <input type="checkbox"/> 401k <input type="checkbox"/> RA <input type="checkbox"/> Life Ins. <input type="checkbox"/> Roth IRA <input type="checkbox"/> Other _____
	Annual Contribution:	Current Balance:
	How much more can you currently contribute?	
Savings 2	Account Name:	Account Type: <input type="checkbox"/> 401k <input type="checkbox"/> RA <input type="checkbox"/> Life Ins. <input type="checkbox"/> Roth IRA <input type="checkbox"/> Other _____
	Annual Contribution:	Current Balance:
	How much more can you currently contribute?	
Savings 3	Account Name:	Account Type: <input type="checkbox"/> 401k <input type="checkbox"/> RA <input type="checkbox"/> Life Ins. <input type="checkbox"/> Roth IRA <input type="checkbox"/> Other _____
	Annual Contribution:	Current Balance:
	How much more can you currently contribute?	
Please return my Retirement Plan to this E-mail address:		

E-mail to info@prosperpbs.com for Retirement Analysis

For Office Use Only	
Option A	Option B
Expected Annual Income:	Expected Annual Income:
Gap in retirement income:	Gap in retirement income:
Increase in contribution needed:	Increase in contribution needed:
Money passed on at death:	Money passed on at death:
Recommendation Explanation:	

