

Retirement Plan Inventory

Employer-Sponsored Retirement Plans		
	Plan 1	Plan 2
Company		
Plan Type (Defined Benefit, Money Purchase, Profit Sharing, 401(k), SEPP, TDA, Deferred Compensation)		
Value as of _____	\$	\$
Account Number		
Benefits Manager		
Telephone Number		
Payout Provisions	Lump Sum or Annuity: Life Only Life ____ Years Certain Joint and ____% Survivor	Lump Sum or Annuity: Life Only Life ____ Years Certain Joint and ____% Survivor

Personal Retirement Plans		
	Plan 1	Plan 2
Bank or Brokerage		
Plan Type (Regular IRA, Roth IRA, Keogh, Personal Non-Qualified Savings)		
Value as of _____	\$	\$
Account Number		
Bank Officer or Broker		
Telephone Number		
Payout Provisions	Lump Sum or Annuity: Life Only Life ____ Years Certain Joint and ____% Survivor	Lump Sum or Annuity: Life Only Life ____ Years Certain Joint and ____% Survivor