



LIFT Factfinder

Do you plan on retiring? Yes No If so, at what age? _____

If money were no object, what are your hopes and dreams for your retirement years? _____

Retirement brings more freedom when it comes to how you'll spend your time. Imagine how your days will unfold. Will you volunteer? Work part-time? Travel? Spend time in leisure or family-related activities? Retirement can be a fulfilling time devoted to your passions, hobbies and other pursuits. How you spend your time can have a significant impact on your retirement finances.

How will you spend your time in retirement?

Will you stay put? Move cross country to be closer to family? Are you considering purchasing a second home? Downsizing? Where you live in retirement can affect your income as well as your emotional, social and physical well-being. When considering a move, many retirees carefully weigh the lifestyle benefits of a new climate or location with the income tax treatment of their home in the state where they choose to reside.

Where will you live in retirement?

What are your fears for your retirement years?

Estimate the following:

Monthly retirement income needs (food, shelter, medical, etc.)		\$
Plus monthly retirement wants (vacations, hobbies, etc.)	+	\$
Desired income for retirement	=	\$
Required income (Social Security, RMDs, pensions, etc.)	-	\$
Income gap from three financial tools	=	\$

How much are you setting aside per month to meet your retirement goals? \$ _____

Capital assets	=	\$
Retirement income assets	=	\$
Tax-preferred assets	=	\$

Using the inventory

Use the Tax-Efficiency Inventory to identify investments with both growth potential and tax advantages. It can help uncover assets that may be better positioned to help you meet your financial goals. Your financial professional can help tax-diversify your assets, so you can keep more of what you've earned.

Capital assets		Retirement income assets		Tax-advantaged assets	
Savings	\$	IRAs	\$	Municipal bonds	\$
Checking	\$			Roth IRAs	\$
CDs	\$	401(k), 403(b) and other pension plan assets	\$	Life insurance cash value ¹	\$
Mutual funds	\$	Annuities	\$	Other	\$
Stocks	\$	Other	\$	Other	\$
Bonds	\$	Other	\$	Other	\$
Treasury securities	\$	Other	\$	Other	\$
Other	\$	Other	\$	Other	\$
TOTAL	\$	TOTAL	\$	TOTAL	\$



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