

Zero Tax Roadmap | Comparison Request Form

Thank you for requesting the Retirement Comparison. The more information you can provide, the more accurate the comparison will be.

First Name _____ Last Name _____
Date of Birth _____ Age _____ Smoker? _____ Health _____
Address _____ City _____ State _____ Zip _____
Phone _____ Email _____
Desired Retirement Age _____ Social Security Start Age _____
Employer _____ Annual Income _____
Retirement Income Goal _____ (Today's Dollars)
Current Life Insurance Company _____
Amount _____ Premium _____ Type _____
Current LTC Insurance Company _____
Monthly Benefit _____ Premium _____
Estimated Monthly **Social Security** at Retirement Age _____
Estimated Monthly **Pension** at Retirement Age _____
Cost of Living Adjustment _____ %

TAX DEFERRED ACCOUNTS (401K, 403B, Traditional IRA)

401K or 403B Company _____
Amount _____ Monthly Contribution _____
Company Match _____ % Rate of Return _____ % (Your Estimate)
Traditional IRA Company _____
Amount _____ Monthly Savings _____ Rate of Return _____

TAXABLE ACCOUNTS (Brokerage Accounts, Mutual Funds, Stocks) Company _____

Account Totals _____ Monthly Savings _____ Rate of Return _____
Estimated Cost Basis _____ %

TAX FREE SAVINGS (ROTH IRA, LIRP life insurance retirement plan) Company _____

Total _____ Monthly Savings _____ Rate of Return _____ (Your Estimate)

REAL ESTATE INVESTMENTS (not including residence)

Net Equity _____ Net Monthly income from Real Estate Investments _____

Bank Accounts Household Combined (Checking and Savings) Amount _____

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Spouse / Partner

First Name _____ Last Name _____
Date of Birth _____ Age _____ Smoker? _____ Health _____
Phone _____ Email _____
Desired Retirement Age _____ Social Security Start Age _____
Employer _____ Annual Income _____
Current Life Insurance Company _____
Amount _____ Premium _____ Type _____
Current LTC Insurance Company _____
Monthly Benefit _____ Premium _____
Estimated Monthly **Social Security** at Retirement Age _____
Estimated Monthly **Pension** at Retirement Age _____
Cost of Living Adjustment _____ %

TAX DEFERRED ACCOUNTS (401K, 403B, Traditional IRA) Company _____

401K or 403B Company _____
Amount _____ Monthly Contribution _____
Company Match _____% Rate of Return _____ % (Your Estimate)
Traditional IRA Company _____
Amount _____ Monthly Savings _____ Rate of Return _____

TAXABLE ACCOUNTS (Brokerage Accounts, Mutual Funds, Stocks) Company _____

Account Totals _____ Monthly Savings _____ Rate of Return _____
Estimated Cost Basis _____ %

TAX FREE SAVINGS (ROTH IRA, LIRP life insurance retirement plan) Company _____

Total _____ Monthly Savings _____ Rate of Return _____ (Your Estimate)

EXPENSES

Total Household Monthly Expenses _____
Mortgage Payment - Principal & Interest Monthly _____ (Included Above)
Year Mortgage Will Be Paid In Full _____