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 William Last Name Hooper

Date of Birth 03/18/1962 Age 55 Smoker? N Health Good

Address 72 Zimmer Dr City Covington State LA Zip 70433

Phone 505 443-9787 Email billhoop@gmail.com

Desired Retirement Age 67 Social Security Start Age 67

Employer Budwiser Annual Income 50,000

Retirement Income Goal 144,000 (Today's Dollars)

Current Life Insurance Company MetLife

Amount 1,000,000 Premium 4,200 Type UL

Current LTC Insurance Company ________

Monthly Benefit ______ Premium ______

Estimated Monthly **Social Security** at Retirement Age 1,433

Estimated Monthly **Pension** at Retirement Age ______

Cost of Living Adjustment ____ %

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

401K or 403B Company Fidelity

Amount 1200 Monthly Contribution 625

Company Match 4.5 % Rate of Return 6 % (Your Estimate)

Traditional IRA Company American Funds

Amount 72000 Monthly Savings 541 Rate of Return 6

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 26,000

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Spouse / Partner

First Name Mary Last Name Hooper

Date of Birth 06/15/1959 Age 58 Smoker? N Health Good

Phone Same Email marhoop@gmail.com

Desired Retirement Age 70 Social Security Start Age 70

Employer BFI Recovery Annual Income 800,000

Current Life Insurance Company MetLife

Amount 1,000,000 Premium 2,100 Type UL

Current LTC Insurance Company ______

Monthly Benefit ______ Premium ______

Estimated Monthly **Social Security** at Retirement Age 2,832

Estimated Monthly **Pension** at Retirement Age ______

Cost of Living Adjustment ______ %

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

401K or 403B Company Principal

Amount 1100 Monthly Contribution 10,000

Company Match ______ % Rate of Return 6 % (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 12,000

Mortgage Payment - Principal & Interest Monthly ______ (Included Above)

Year Mortgage Will Be Paid In Full ______