



CLERGY TAX RELIEF

PERSONALIZE YOUR RETIREMENT PLAN

Years to Retirement:

Current Monthly Income Need:

Income Sources at Retirement:

- Your Pension Plan(s)
- Spouse's Pension Plan(s)
- Your Social Security
- Spouse's Social Security
- Other (*Retirement Income*)
- Other (*Retirement Income*)
- Other (*Retirement Income*)

Assets Reserved for Retirement

Item	Today's Value	Annual Contribution	Average Annual Earnings
My 401(k)			
Spouse's 401 (k)			
My IRA			
Spouses IRA			
Other Investments			

Rental Property (Address)	Cost Basis	Today's Value	Mortgage Balance	Net Annual Earnings