



## Personal Retirement Inventory

Take inventory of your current retirement savings for both you and your spouse in columns 1 and 2. Add these amounts across each row and write the total in column 3. Then add all the amounts down column 3 for a total personal retirement inventory.

Savings Type	You	Your Spouse	Total
<b>Work Related Savings</b>			
401(k) Plan Balance	\$	\$	\$
Pension Plan Estimate	\$	\$	\$
Other	\$	\$	\$
IRA (Traditional)	\$	\$	\$
IRA (Roth)	\$	\$	\$
Other	\$	\$	\$
<b>Home Equity</b>			
Market Value of Home	\$	\$	\$
Mortgage and Liens (Subtract)	\$	\$	\$
Personal Savings and Investments	\$	\$	\$
Inheritance	\$	\$	\$
Other Assets (Collections, etc.)	\$	\$	\$
<b>Total Assets</b>	\$	\$	\$