Identifying Your Sources of Retirement Income

Now that you have an idea of what you want to do, it's time to see how much you'll be able to afford to do. What sources might you have to create your "paycheck" in retirement?

List as many sources as you have, plus assets and accounts that could be converted into income. Indicate time frames where applicable.

Lifetime Income	Description/Timing	You	Spouse/ Partner
Social Security		$	$
Pension Plans		$	$
Fixed Annuities		$	$
Other		$	$
Other		$	$
	Total Lifetime Income	$	$

Tax-Deferred Assets	Description	You	Spouse/ Partner
Employer-Sponsored Retirement Plans [401(k)s, 403(b)s, etc.]		$	$
IRAs: Traditional, Rollover, SEP		$	$
Inherited IRAs		$	$
Variable Annuities		$	$
Other		$	$
	Total Tax-Deferred Assets	$	$

Identifying Your Sources of Retirement Income *(continued)*

Taxable Investment Income Sources	Description	You	Spouse/ Partner
Taxable Investment Accounts		$	$
Savings Accounts		$	$
CDs		$	$
Other		$	$
	Total Taxable Investments	$	$

Additional Investment Income Sources	Description	You	Spouse/ Partner
Real Estate/Rental Income (month)		$	$
Inheritance		$	$
Employer Stock Options		$	$
Life Insurance		$	$
Property/Collectibles		$	$
Roth IRAs (Tax-free)		$	$
Other		$	$
	Total Investment Income Assets	$	$

To access our Planning & Guidance Center tool, go to NetBenefits.Fidelity.com/planningcenter.