



Name: _____

Date: _____

Your Specific Retirement Objectives

1) Income Stream

How Much? \$ _____ (Pre-tax or After tax (circle one))

Minimum ____% of Income Stream Guaranteed

2) Liquidity (Money Not Being Drawn Upon For an Income Stream)

\$ _____

3) Legacy

\$ _____

(If there are no specific legacy objectives then generally this is as much as possible after Income and Liquidity objectives are met)