



# IRMAA FACT FINDER

## LET US SOLIDIFY YOUR RETIREMENT TOGETHER

### Basic Information

First Name      Last Name      Gender      Retirement Age

You

Spouse

### Tax Status in Retirement

Married Filing Jointly

Married Filing Separate

Single

### Social Security Information

Gross Monthly Benefit      Age to start

Primary

Spouse

### Target Monthly Income

### State in which you will Retire

### Do you own Cash Value Life Insurance

Yes

No

### List your 401(k), IRA's

Asset	Owned By	Balance at Retirement	Expected Rate of Return	Age to Begin Withdrawal	Monthly Withdrawal Amount
-------	----------	-----------------------	-------------------------	-------------------------	---------------------------

### List your Roth IRA's, Roth 401(k)

Asset	Owned By	Balance at Retirement	Expected Rate of Return	Age to Begin Withdrawal	Monthly Withdrawal Amount
-------	----------	-----------------------	-------------------------	-------------------------	---------------------------

### List any Pensions

Owned By	Monthly Income	COLA
----------	----------------	------

### Wages, Rental and Other Retirement Income

Owner	Type of Income	Monthly Amount
-------	----------------	----------------

### List any Brokerage Accounts

Owned By	Tax Rate	Monthly Withdrawal Amount	Age of Withdrawal
----------	----------	---------------------------	-------------------

### List any Annuities

Owned By	Tax Rate	Monthly Withdrawal Amount	Age of Withdrawal
----------	----------	---------------------------	-------------------