



# Managing your IRA savings for life

A COMPLIMENTARY SERVICE OF DRAKE, SAUNDERS & DIWINSKY LTD

YOUR RETIREMENT PLANNING SPECIALIST

[www.retirementmoney.biz](http://www.retirementmoney.biz)

## Family information

Name \_\_\_\_\_ Date of birth \_\_\_\_\_

Spouse \_\_\_\_\_ Date of birth \_\_\_\_\_

## IRA/Qualified Retirement Plan information

YOU

SPOUSE

Total IRA value \_\_\_\_\_

Current Income from IRA \_\_\_\_\_

When do you expect to pull money from your IRA? \_\_\_\_\_

What is your and your spouse's life expectancy? \_\_\_\_\_

What do you consider a reasonable rate of return? \_\_\_\_\_

## Net worth information

Do you own your own home? \_\_\_\_\_

What is the value of your home? \_\_\_\_\_

How much is owed against the home? \_\_\_\_\_

Do you have significant assets outside your IRA and home? \_\_\_\_\_

If so, ballpark how much are they worth? \_\_\_\_\_

What do you consider a reasonable rate of return on your home? \_\_\_\_\_

What do you consider a reasonable rate of return on other assets? \_\_\_\_\_

Is there any other information that may be applicable? \_\_\_\_\_

***We will use this information for a complimentary, confidential two-hour evaluation of your current financial situation and discuss avenues to pursue to:***

- Protect your current wealth so you have Peace of Mind
- Grow your IRA savings tax-free through age 70
- Design maximum tax-savings strategies to preserve your savings after age 70
- Assure that your beneficiaries, especially your children, avoid unnecessary taxes on your IRA inheritance.