



Retirement Income Sources Map

Session 6 - Retirement Readiness and Income Planning | Participant Resource | Version 1.0

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

Map each source

Source / Estimated start / Amount or range / Inflation feature / Survivor feature / Needs review

Social Security: _____

Pension: _____

Workplace plan: _____

IRA or Roth account: _____

Annuity or guaranteed source: _____

Work or business: _____

Other savings or assets: _____

Largest unknown

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