

Council 82 Retirement Projection Request

Please complete the information below regarding your retirement income objectives, current retirement savings, and employment information (e.g., years of service), and an advisor will provide a projection of your retirement income. The report combines the personal information provided by you with data from the New York State Retirement System as well as Social Security and delivers a customized projection of retirement income. Your report will identify if you will need additional retirement savings in order to meet your stated retirement income objectives, and if so, you and your advisor may then develop a plan to address the shortfall.

Name _____

Address _____

City _____ State _____ Zip _____

Employer _____

Daytime Phone _____ Evening Phone _____

Email Address _____ Best time to contact _____

Date of Birth _____ Sex: Male Female

Estimated Retirement Date _____

Date (or Year) of Entry into NYS Retirement System _____

Current Salary _____ Future Salary Increase Projection Rate _____%

Pay Periods per Year _____

Beneficiary's Name _____ Relationship to you _____

Beneficiary's Date of Birth _____ Beneficiary's Sex: Male Female

Additional Information *(Required for Comprehensive Projections)*

Annual Retirement Income Objective \$ _____ or **% of Current Income** ____%

Annual Contributions to Retirement plan(s) \$ _____ or % of Salary ____%

Retirement Incentive Bonus \$ _____

Investment Assets \$ _____ *(Current balances in all your savings & retirement accounts. Do not include home equity, future savings or investment contributions, or balance of state retirement system.)*

Estimated Future After-Tax Investment Growth Rate ____%

Estimated Inflation Rate ____%