



ASSETS AVAILABLE TO GENERATE RETIREMENT INCOME

The IBEW Local Unions Savings and Security Plan

Name _____ Date _____

List all available assets that can be used to generate additional retirement income.

- 1. Retirement Investments**
 - Pension Plan Lump Sum _____
 - 401(k) Accounts _____
 - IRAs _____

Total eligible for rollover to IBEW Savings and Security Plan _____

- 2. Other Household Savings & Investments** _____
 - CDs _____
 - Savings/Money Market (exclude emergency fund*) _____
 - ESOP _____
 - Mutual Funds _____
 - Stocks _____
 - Bonds _____
 - Annuities _____
 - Other _____

- 3. Spouse's Retirement Assets**
 - Pension Plan Lump Sum _____
 - 401(k) Accounts _____
 - IRAs _____

TOTAL ASSETS AVAILABLE FOR RETIREMENT _____

* An Emergency Fund is a savings account or money market fund of approximately 3-6 months of after-tax income that can be quickly accessed to pay for unforeseen costs such as house repairs, uncovered medical expenses, etc.