

Retirement Plans

This spreadsheet summarizes your retirement plans.

Data input cells are shaded. All other cells are protected.

Retirement Plans

April 18, 2021

Employer-Sponsored Plans

Name of Plan/Employer	Phone Number	Your Annual Contribution	Present Value Now	Yearly Benefits Now	Retirement Benefit	Death Benefits	Beneficiaries	H, W ¹
Pension								
IMB Corporation	800-999-7777	\$10,000	\$50,000	None	\$20,000	\$100,000	Wife	H
Profit-sharing								
IMB Corporation	800-999-8888	\$4,000	\$40,000	None	\$10,000	None	Wife	H
401(K) or 403(b)								
Keogh Plan								
Other								
Total All Plans		\$14,000	\$90,000		\$30,000	\$100,000		

¹ H-Husband; W-Wife; J-Jointly owned

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