

Retirement Assets Worksheet

Identifying all of your retirement assets is a great place to start planning for retirement. Print this worksheet and use it to help you keep track of your retirement assets and see where you stand with your retirement savings.

Today's Retirement Assets

Retirement

401(k): \$ _____
403(b): \$ _____
457: \$ _____
IRAs: \$ _____

Investments

Stocks: \$ _____
Bonds: \$ _____
Mutual funds: \$ _____
Money market funds: \$ _____
Other: \$ _____

Bank Accounts

Savings/checking accounts: \$ _____
Certificates of deposit (CDs): \$ _____

Total \$ _____