

Retirement Plan Inventory Worksheet

Use the table below to list all of your current retirement savings. Estimate fund balances at this current time or use your fund statements to provide actual numbers. (Examples are provided.)

Plan Name	Matching Contribution	Savings Category	Investment Type(s)	Annual Growth Rate	Current Balance
<i>University of Wisconsin Tax Sheltered Annuity</i>	<i>No</i>	<i>Roth 403(b)</i>	<i>Target date mutual fund (stocks and bonds)</i>	<i>4%</i>	<i>\$9,000</i>
<i>XYZ Corporation</i>	<i>Up to first 3%</i>	<i>401(k)</i>	<i>Employer stock and balanced mutual fund (stocks/bonds)</i>	<i>5%</i>	<i>\$5,600</i>
Estimated Total					\$

