iRetire®
by BlackRock®

Information checklist

This form will help you prepare to hold a valuable conversation with your advisor using iRetire® about how to achieve the number that really matters: the income you could have each year in retirement. iRetire helps empower your decisions, illustrating the tradeoffs between risk, retirement date, income needs and spending.

Statements to bring to meeting: ☐ Social Security statements ☐ Investment and Retirement

Profile information

Name 1: ____________________

Current age: ________ Already retired? Y N

If not, desired retirement age: ____________

Current retirement spending:

$ ____________________

If not retired, desired future retirement income:

$ ____________________

Name 2: ____________________

Current age: ________ Already retired? Y N

If not, desired retirement age: ____________

Current retirement spending:

$ ____________________

If not retired, desired future retirement income:

$ ____________________

Income information
(insert annual figures)

Pension 1:

$ ____________________

Social Security (if not yet receiving enter estimate):

$ ____________________

Annuity income:

$ ____________________

Other sources of retirement income (i.e. rental income):

Type	Amount

Pension 2:

$ ____________________

Social Security (if not yet receiving enter estimate):

$ ____________________

Annuity income:

$ ____________________

Other sources of retirement income (i.e. rental income):

Type	Amount

Asset summary
(if not retired)

Type (401(k) etc.)	Amount

Annual contributions (including company match, if any):

$ ____________________

Type (401(k) etc.)	Amount

Annual contributions (including company match, if any):

$ ____________________

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IMPORTANT: The projections or other information generated by the iRetire tool regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time.

Any information contained in or generated by the iRetire tool should not be construed as or relied upon as investment advice, research or a recommendation by BlackRock Investments, LLC or any of its affiliates (collectively, "BlackRock") regarding the use or suitability of any particular allocation, fund or overall investment strategy. The iRetire tool is designed to be used in consultation with an advisor, and should not be relied on as a primary basis for an investment decision. Only an investor and his or her advisor know enough about the investor's circumstances to make an informed investment decision. Any decision to invest in a fund or implement an asset allocation or portfolio generated by the iRetire tool is solely an advisor's decision in consultation with the client.

The iRetire tool does not guarantee future income or protect against loss of principal. There can be no assurance that an investment strategy based on the iRetire tool will be successful.

Prepared by BlackRock Investments, LLC, member FINRA.

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