

FedFirePay Retirement Basic Data Form

Basic Information

Name	Phone Number
<input type="text"/>	<input type="text"/>
E-mail	Date of Birth
<input type="text"/>	<input type="text"/>
Grade & Step	SCD Leave
<input type="text"/>	<input type="text"/>
Locality Area	Retirement Date
<input type="text"/>	<input type="text"/>
Work Schedule Hours	Sick Leave Balance
<input type="text"/>	<input type="text"/>
Survivor 50% / 25% / 0%	Spouse Date of Birth
<input type="text"/>	<input type="text"/>

Supplement & Social Security

Refer to Social Security estimate at ssa.gov for the projected benefits at ages 62 & 67

Social Security - Age 62	Social Security - Age 67
<input type="text"/>	<input type="text"/>
S.S. Desired Start Age	Military Years & Months
<input type="text"/>	<input type="text"/>

Thrift Savings Plan

Current Balance	Percentage in Stocks
<input type="text"/>	<input type="text"/>
Bi-Weekly Contribution	Withdrawal Age
<input type="text"/>	<input type="text"/>

Health and Life Insurance

Refer to LES for FEGLI 2 digit code - Examples: **C0** or **Z5**

FEHB Premium	FEGLI Code
<input type="text"/>	<input type="text"/>

Please return the completed form to anthony@fedfirepay.net a few days before your appointment.

Contact me if you have any questions or concerns.

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VA & Military Income

Do not include any VA supplement pay for children

VA Disability

Military Retirement

Other Income

The software is not designed to calculate other pension or retirement savings
We will discuss options for adding this type of income during your appointment

Living Expenses

Estimate current monthly and annual expenses - they will be adjusted for inflation
Annual expenses are things like vacations, auto insurance, property tax, etc.
List separately mortgages and other expenses that have an end date

Monthly Expenses

Annual Expenses

Mortgage

Age Mortgage Paid-off

Loan

Age Loan Paid-off

Other Expense

Age Expense Ends

Other Information

Provide any additional information you think pertinent in the space below. If you plan to retire within the next 2 years, please provide dates and details of any recent step increases or promotions.

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