FedFirePay Retirement Basic Data Form

Basic Information

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

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
S.S. Desired Start Age	Military Years & Months

Thrift Savings Plan

Current Balance	Percentage in Stocks
Bi-Weekly Contribution	Withdrawal Age

Health and Life Insurance

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

FEHB Premium	FEGLI Code

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 Payment	Age Mortgage Paid-off
Monthly Loan Payment	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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