

Additional Income Worksheet



In retirement, your household is likely to have a patchwork of income streams. Some potential sources of additional retirement income are listed below. Take some time to fill out the total dollar amount your household has saved for each source. To calculate how much income you can pull from these accounts each year, we recommend meeting with a financial adviser.



TIP

To learn more about generating income from assets in the accounts listed, contact the **CalSTRS Pension2** team toll free at 888-394-2060.

Employer-Sponsored Retirement Savings

403(b)	\$
Roth 403(b)	\$
457(b)	\$
401(k)	\$
Roth 401(k)	\$
TOTAL	\$

Individual Retirement Savings

IRA	\$
Roth IRA	\$
SEP IRA	\$
Other	\$
TOTAL	\$

Personal Investments/Savings (Brokerage Accounts)

Mutual Funds	\$
Equities	\$
Bonds	\$
CDs	\$
Savings	\$
TOTAL	\$

COMBINED TOTAL	\$
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