

# Employee Data Sheet -4/10/21

Phone No: \_\_\_\_\_ Date: \_\_\_\_\_ City/State: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Retirement Age \_\_\_\_\_ Agency: \_\_\_\_\_

Hire Date/Years of Service: \_\_\_\_\_ Annual Salary: \_\_\_\_\_ DOB: \_\_\_\_\_

High 3 salary: \_\_\_\_\_ Annual FERS/CSRS Pension: \_\_\_\_\_ Monthly FERS/CSRS Pension \_\_\_\_\_

Home address \_\_\_\_\_

E-MAIL \_\_\_\_\_ HOME PHONE: \_\_\_\_\_

Married: Y/N Name/DOB \_\_\_\_\_

FEGLI Basic: Y N Bi-weekly Cost \$: \_\_\_\_\_ Y N If not 59.5, date turning 59.5? \_\_\_\_\_

Fegli: Option A: Y N Option B: Y N Option C: Y N

TSP Account Value: \$ \_\_\_\_\_ G \_\_\_\_\_ C \_\_\_\_\_ S \_\_\_\_\_ I \_\_\_\_\_ F \_\_\_\_\_ L \_\_\_\_\_

SS \$ \_\_\_\_\_ AT:Age: \_\_\_\_\_ **Some Additional INFO so I can select the BEST**

## **ANNUITIES FOR YOU**

Other Income Sources: Spouse: \_\_\_\_\_ Disability: \_\_\_\_\_ SS: \_\_\_\_\_ Pension: \_\_\_\_\_

Current Expenses: Mtg, \_\_\_\_\_ General Living expenses/mo.\$ \_\_\_\_\_ Savings accounts \$ \_\_\_\_\_

Checking \_\_\_\_\_ Savings \_\_\_\_\_ Money market \$ \_\_\_\_\_

Other Investment 1 Account Value: \_\_\_\_\_ Type: (RE?)( Securities) \_\_\_\_\_

Other Investment 2 Account Value: \_\_\_\_\_ Type: (Gold) \_\_\_\_\_

Other Investment 3 Account Value: \_\_\_\_\_ Type: \_\_\_\_\_

Living Trust: Y N Follow up date: \_\_\_\_\_ Follow up time: \_\_\_\_\_

Drivers Lisc.: State \_\_\_\_\_ NO: \_\_\_\_\_ EXP: \_\_\_\_\_