Income Fact Finder

Check Your Retirement Income Outlook





A member of Western & Southern Financial Group

Issuers: Integrity Life Insurance Company | National Integrity Life Insurance Company | Western-Southern Life Assurance Company

Compare Your Income **Needs** and Income **Sources**

Plan for the Retirement Lifestyle You Want

SOURCES: List Your Expected Lifetime Income Sources		
Source	Guarantor	Мо
Social Security	US Government	\$
Employer-Sponsored Pension Benefits		\$
Other Guaranteed Income		\$
Total		\$

OMPARE: List the Totals of Your Needs (A) and Sources		
Category		Tot
Primary Monthly Income Needs	\$	А
Guaranteed Monthly Income Sources	\$	В
Surplus or Shortage	+/-	

List Your Investable Holdings		
Asset	Source	
Savings		\$
CDs & Money Market Accts.		\$
Mutual Funds		\$
Stocks & Bonds		\$
IRAs & Qualified Plans		\$
Business/Property		\$
Total		\$

Retirement Income Fact Finder

Sizing up your retirement readiness can be *simplified*. Just use this fact finder to help evaluate your expected expense **needs** and estimated income **sources**. Compare your needs (*below*) with your sources (*right*) to see where you stand for retirement.

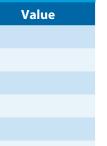
Need	Details	Monthly Amount
Housing	Mortgage/Rent/Fees	\$
	Taxes & Insurance	\$
	Utilities	\$
	Home Improvement	\$
	Maintenance & Repair	\$
Food	Groceries	\$
	Dining	\$
	Loan/Lease Payments	\$
Transportation	Taxes & Insurance	\$
	Fuel & Maintenance	\$
	Other	\$
Healthcare	Healthcare Coverage	\$
	Medicare	\$
	Co-pays & Uncovered Expenses	\$
	Drugs & Medical Supplies	\$
Insurance	Life Insurance	\$
insurance	Long-Term Care	\$
Recreation	Entertainment	\$
	Travel	\$
	Hobbies	\$
Personal Care	Clothing	\$
	Products & Services	\$
Gifts	Cash & Presents	\$
GITTS	Charitable Donations	\$
Taxes	Income	\$
	Other	\$
Total		\$ A

NEEDS: List Your Expected Monthly Income Needs



What's the Difference?

> If **A** is larger than **B**, you may not have enough lifetime retirement income.



Make a Plan

Do you need more income to cover your needs? Consider moving some of your assets (left) into a different financial services product. Doing so may help provide more **guaranteed income**.

Ask your financial professional about products and strategies and solutions that can help create your retirement income outcome.

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