

Retirement Readiness Statement

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

Dear [Recipient's Name],

As you approach the significant milestone of retirement, we have prepared this retirement readiness statement to give you an overview of your current financial situation and readiness for retirement.

Overview of Current Assets

- Retirement Accounts: \$[Amount]
- Investments: \$[Amount]
- Other Assets: \$[Amount]

Estimated Monthly Expenses in Retirement

\$[Amount]

Projected Income Sources

- Social Security: \$[Amount]
- Pension: \$[Amount]
- Withdrawals from Retirement Accounts: \$[Amount]

Readiness Assessment

Your projected income in retirement is estimated to be \$[Projected Income], while your monthly expenses are expected to be \$[Monthly Expenses]. This indicates a [surplus/deficit] of \$[Amount].

We recommend reviewing your financial plans and considering adjustments if necessary. It is crucial to ensure a comfortable retirement.

If you have any questions or wish to discuss your retirement plans further, please feel free to contact us.

Sincerely,

[Your Name]

[Your Title]

[Your Company]