



Roadways Mile Marker Trip Planner

The Roadways Mile Marker takes you through a simple 5-step wizard to get a snapshot of your road to retirement. To make the most of your Roadways Mile Marker session, it's helpful to do a little pre-planning.

Here are a few things you might need to have handy:

- ☐ Retirement plan statement
- ☐ Statements you have from any IRA, Brokerage Account, Bond, or other asset
- ☐ Your home equity
- ☐ A current pay stub showing your retirement plan deferral and employer contribution (if applicable)

Use the worksheet below as a quick reference in completing your online Roadways Mile Marker steps. It'll save you a little bit of trip time in planning your journey.

Step 1: Basic Information

What's your anticipated retirement age?	
How many years do you expect to live in retirement?	
What's your current annual salary?	
How often are you paid?	
What's your expected annual salary increase (estimated percentage)?	

Step 2: Annual Assumptions

What % of your annual salary do you contribute to your retirement account?	
What % of your annual salary does your employer contribute to your retirement account (if any)?	
What's your anticipated annual rate of return (%) for your retirement account from now until retirement?	
What's your anticipated annual rate of return (%) for your retirement account after you retire?	

Step 3: Retirement Assets

What are your estimated monthly Social Security Benefits? (For help, visit: ssa.gov/planners/calculators)	
Do you have any other assets or retirement income? If so, include amounts and annual rate of return:	
<input type="radio"/> IRAs, Brokerage Accounts, Bonds, other assets	
<input type="radio"/> Value of Home Equity	
<input type="radio"/> Annuity, Pension Plan	
<input type="radio"/> Part-time job	

Step 4: Retirement Needs

What % of income do you wish to replace in retirement?	
What's your estimated annual inflation rate?	

Step 5: Retirement Needs

Review the summary information. If you're satisfied with your Roadways Mile Marker result, scroll down to the bottom of the page and click Set as Current Goal.

Congratulations! You're now on your way to a successful retirement. Be sure to login to your account at u.bpas.com and check your progress regularly. You can also find a wealth of planning tools and presentations to help plan your journey in the BPAS University at u.bpas.com.

Questions? Contact us at [P 866-401-5272](tel:866-401-5272) [W u.bpas.com](https://u.bpas.com)

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