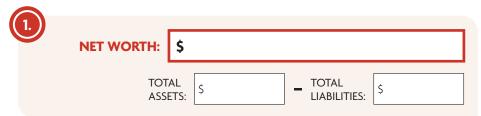
21 Key Stats

WORKSHEET

Know your money numbers

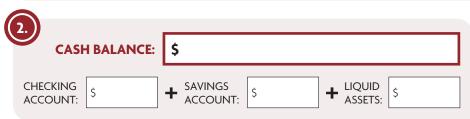
Complete on your own or with your financial professional.

Date:





To find current rates and thresholds, search on your state's estate tax exemption. Federal estate taxes of 40% apply on assets of \$13.61 million or more for 2024.



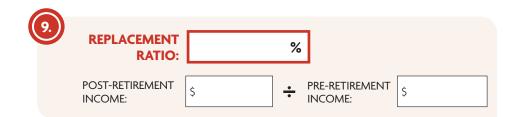






See the U.S. Bureau of Labor Statistics for Consumer Price Index (CPI) and Producer Price Index (PPI) rates, published monthly.

4.	ADJUSTED GROSS INCOME:	\$
	TOTAL GROSS INCOME:	\$ QUALIFIED S S

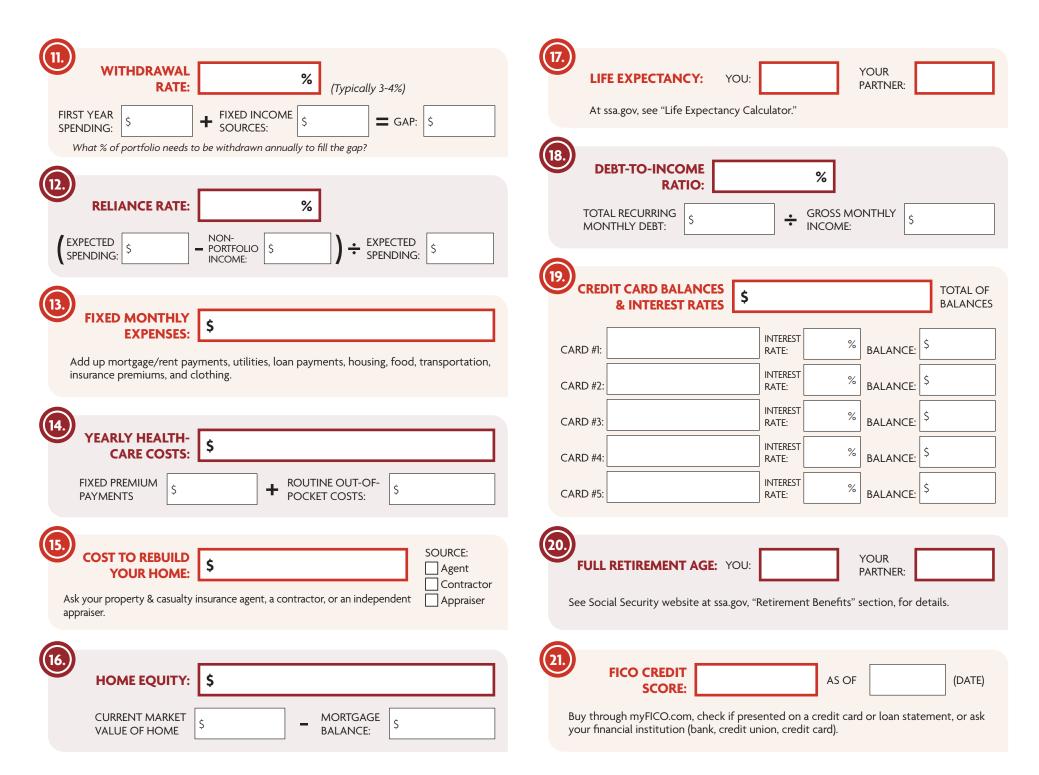




SAVINGS RATE FOR RETIREMENT: %

To find current tax bracket tables, visit the IRS website and note rates for single and married filers.

Suggested 15% of your annual salary depending on your circumstances.



Now that you're done, your money numbers reveal opportunity as well as risk.

Discuss them with your financial professional to take advantage of your options and develop financial solutions.

Brought to you by:



Bell, K., & Orem, T. (2024, January 30). Estate Tax: Definition, Tax Rates and Who Pays. NerdWallet. https://www.nerdwallet.com/article/taxes/estate-tax

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