

ONE EMPLOYER AT A TIME

# Your retirement search tracker

Print one copy of this page for each former employer. Use brief notes only. Do not write Social Security numbers, passwords, full account numbers or identity-document details here.

Employer / union and any later company name

Approximate years worked / work location

Plan name / type, if known (401(k), pension, other or unknown)

Clues found (statement, old letter, provider name or other record)

Verified administrator / provider contact and official website

Latest result (a lead is not confirmation of a benefit)

Next action / who will do it / follow-up date

## Before sharing any documents

Verify the recipient and ask for its secure submission process. Keep the completed tracker private; do not send it to Friendly's Financial.

KEEP THE TRAIL TOGETHER

# Calls, searches & follow-ups

Employer / plan: \_\_\_\_\_

Make extra copies when needed. A follow-up date is your reminder, not an extension of a claim or appeal deadline.

**Date / official site or verified person contacted:**

\_\_\_\_\_

**Result / documents requested (no sensitive details):**

\_\_\_\_\_

**Next action / follow-up date / any stated deadline:**

\_\_\_\_\_

**Date / official site or verified person contacted:**

\_\_\_\_\_

**Result / documents requested (no sensitive details):**

\_\_\_\_\_

**Next action / follow-up date / any stated deadline:**

\_\_\_\_\_

**Date / official site or verified person contacted:**

\_\_\_\_\_

**Result / documents requested (no sensitive details):**

\_\_\_\_\_

**Next action / follow-up date / any stated deadline:**

\_\_\_\_\_

Need a starting point? Read the companion guide at [friendlysfm.com/resources/lost-retirement-accounts/](https://friendlysfm.com/resources/lost-retirement-accounts/). It includes official search tools and a call script.