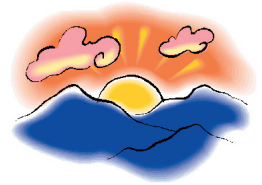


# Your Retirement Lifestyle Plan

## Retirement Goal

In what year would you like to Retire? \_\_\_\_\_



How much money will you need to live on after you Retire? Because your Retirement is many years in the future, it's difficult to predict. Usually, the best approach is to make your Retirement Goal equal to the amount you are spending today (excluding taxes and savings) to maintain your current lifestyle. Do not include the cost of the Other Financial Goals that you will enter below. Enter the amount of after-tax cash you need each year (today's dollars).

Retirement Living Expense Amount: \$ \_\_\_\_\_

## Other Financial Goals

Think about all the Goals you would like to accomplish for which you will save and invest (do not include expenses that will be paid from employment income). Include what you need, like paying for the kids college, what you want, like taking a special vacation, and even what you wish you could do, like buying a beach house. Make each one a separate Goal, with a description, an annual cost and how often it will occur (see Step 1 of the sample plan.) Then put a number in the box next to each Goal (including your Retirement Expense Goal) to indicate its order of importance.

Buy Car(s)



\_\_\_\_\_  
 \_\_\_\_\_



College

\_\_\_\_\_  
 \_\_\_\_\_

Travel - Every Year



\_\_\_\_\_  
 \_\_\_\_\_



Help My Kids

\_\_\_\_\_  
 \_\_\_\_\_

Major Purchase



\_\_\_\_\_  
 \_\_\_\_\_



Travel - One Special Trip

\_\_\_\_\_  
 \_\_\_\_\_

Home Improvements



\_\_\_\_\_  
 \_\_\_\_\_



Gift or Donation

\_\_\_\_\_  
 \_\_\_\_\_

Provide Care for Someone



\_\_\_\_\_  
 \_\_\_\_\_



Wedding/Celebration

\_\_\_\_\_  
 \_\_\_\_\_

Other



\_\_\_\_\_



Other

\_\_\_\_\_

# Personal Information

## Personal

	Client	Spouse
Name		
Date of Birth		
Employment Status	<input type="checkbox"/> Employed <input type="checkbox"/> Business Owner <input type="checkbox"/> Retired <input type="checkbox"/> Homemaker/Other	<input type="checkbox"/> Employed <input type="checkbox"/> Business Owner <input type="checkbox"/> Retired <input type="checkbox"/> Homemaker/Other
Employment Income	\$ _____	\$ _____
State of Residence	_____	_____

## Risk Tolerance

What type of Investor are you? Select one description based upon your willingness to accept investment risk.

Very Conservative   
  Conservative   
  Moderate   
  Aggressive   
  Very Aggressive



## Investment Assets

Description	Client		Spouse		Description	Joint Total	
	Value	Additions/Yr	Value	Additions/Yr		Value	Additions/Yr
Employer Plans					Taxable		
Traditional IRA					Tax-Free		
Roth IRA							
Tax-Deferred							

## Retirement Income

Description	Client	Spouse	Amount	Inflate?
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes

## Other Assets - Only those that will be needed to fund goals

Description	Year	Amount	Tax-Free
			<input type="checkbox"/> Yes
			<input type="checkbox"/> Yes
			<input type="checkbox"/> Yes
			<input type="checkbox"/> Yes

## Notes

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