

Retirement Goals



Proposed retirement date _____

Monthly income requirements _____

Major sources of retirement income _____

Social security amount _____

Pension _____

Retirement fund withdrawals _____

IRAs _____

Annuities _____

Other _____

Other _____

Other _____

Places I'd Like to Go After I Retire

1. _____ 2. _____ 3. _____

4. _____ 5. _____ 6. _____

7. _____ 8. _____ 9. _____

Things I'd Like to Do After I Retire

1. _____ 2. _____ 3. _____

4. _____ 5. _____ 6. _____

7. _____ 8. _____ 9. _____

Setting definite goals long before you actually retire gives you a way to create a step-by-step plan to make sure you actually get there. Don't put it off until a few months before they hand you the gold watch.



Last Will and Testament

Location _____

Executor _____

Attorney _____

Special instructions _____

Life Insurance Policies

Location _____ Location _____

Contact _____ Contact _____

Phone _____ Phone _____