What Are Your Retirement Goals?







Importance

/year

/year

/year

/year

/year

/year

(10 - 1)

Basic Living Needs (Healthcare expense estimates will be automatically added)

Mortgage or Rent	/year	Auto Insurance	/year
Utilities	/year	Homeowners Insurance	/year
Routine Home Maintenance	/year	Life/Disability/Long-Term Care Insurance	/year
Automobile Costs/Maintenance	/year	Other:	/year
Car Payments	/year	Other:	/year
Personal Care/Clothing	/year	Other:	/year
Food	/year	Other:	/year
		Total	/year

Ongoing Discretionary Spending

Importance (10 - 1)Travel/Vacation /year Other: Gifting to Family Other: /year Charity /year Other: Education/College /year Other: Other: /year Other:

Total

Major Purchases

Major Home Improvement /year

New Home Purchase /year

Wedding /year

Boat Purchase /year

RV Purchase /year

	Importance _ (10 - 1	
Vehicle Replacement	/year	
Other:	/year	

Total /year

