

What Are Your Retirement Goals?



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

Major Purchases

	Importance (10 - 1)		Importance (10 - 1)
Major Home Improvement	/year	Vehicle Replacement	/year
New Home Purchase	/year	Other:	/year
Wedding	/year	Other:	/year
Boat Purchase	/year	Other:	/year
RV Purchase	/year	Other:	/year
Total		/year	

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