

RETIREMENT PLANNING WORKSHEET

ARE YOU PREPARED FOR RETIREMENT? CAN YOU ANSWER THE FOLLOWING QUESTIONS?

What age will you retire?

When do you plan on taking Social Security?

Expressed in terms of current income, what percentage of current income will you need to fund your retirement lifestyle?

Are your retirement assets performing in line with your expectations / needs?

How long will your retirement assets last?

If there is a shortfall, what variables are you going to adjust to get your plan on track?

If there is not a shortfall, how would you redirect assets?

What percent of your retirement income will be taxable?

What percent of your retirement income will you receive tax free?

Have you planned for emergencies such as a major illness during retirement?

Are you interested in working during retirement?

Is your Life Insurance portable and or convertible?

Do you have a formal Financial Plan?

NOTES

**FINANCIAL PLANNING IS AN ESSENTIAL PROCESS TO ANSWERING ALL OF YOUR
RETIREMENT QUESTIONS**

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