

RETIREMENT STRATEGY ANALYSIS



Date: _____

Household Name: _____

STATED RETIREMENT GOALS

Annual Spending in Today's Dollars	\$
Targeted Retirement Age	
Portfolio Blend	
Life Changing Retirement Goals	
Likelihood of Success	

NOTES

Blank area for notes.

RECOMMENDATIONS TO IMPROVE THE PLAN

Annual Spending in Today's Dollars	\$
Targeted Retirement Age	
Portfolio Blend	
Life Changing Retirement Goals	
Likelihood of Success	

NOTES

Blank area for notes.