

AM I SAVING ENOUGH TO REACH MY retirement goals?

Retirement Income Planning =
Funding Needs and Considering Wants

RELIABLE INCOME

Could Include:
Social Security
Pension
Part Time Job
Farm Rents
Rental Income Stream

Funds

NEEDS

Include:
Housing
Food
Medical Care
Insurance
Transportation

Fills in the gaps

RETIREMENT ASSETS

401K
Individual Retirement
Accounts
Individual Accounts
Sale of Business

Fills in the gaps

WANTS

Gifting
Travel
Home Renovation
Hobbies

WHAT ARE YOUR SOURCES OF INCOME?

RIGHT NOW

Think about the steps you need to take to move towards realizing your retirement income goals. These steps need to be measurable and actionable. What can you do on your own? Where do you need help?