

Retirement Planning Quickstart Worksheet

If you are married or have a life partner, enter amounts for both of you.

What age would you like to retire? _____

Expected monthly Social Security Income at: Age 62 _____ Full Retirement Age _____ Age 70 _____

Expected monthly pension income (if any) Life Only _____ Joint 100% _____ Joint 50% _____

Guesstimate your monthly living expenses during retirement. _____

Do you have any health insurance benefits that will extend into retirement? (ex. VA, retiree credit, etc.)

Estimated monthly health insurance costs: _____

Do you have any large liabilities that will end during retirement? (ex. mortgage, car, lake, etc.)

Monthly amount _____ Date liability will be paid off _____

Monthly amount _____ Date liability will be paid off _____

Monthly amount _____ Date liability will be paid off _____

Are there any large expenditures you have planned during retirement? (ex. Purchase of 2nd home, travel, remodel, car/truck/RV, child/grandchild wedding/college, other large purchase, etc.)

Approximate amount _____ Year of expenditure _____

Approximate amount _____ Year of expenditure _____

Approximate amount _____ Year of expenditure _____

Assets available for retirement. (ex. 401k/403b/457, IRAs, Roth IRAs, brokerage accounts, CDs, etc.)

Account Type	Owner	Balance	Monthly Contribution
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____