

Retirement Planning Worksheet

As with any savings program for funding a future financial objective, the sooner you start, the better. Because we now live longer during our retirement years, more money than ever needs to be accumulated for the security of not running out of money once you stop working. The retirement planning information requested below is used to prepare a retirement cash flow, which shows how much you need to accumulate in order to have a financially secure retirement.

Desired Retirement Age: You _____ Spouse _____

Monthly Retirement Income Desired (after taxes-in today's dollars): \$ _____

Current Monthly *Tax-Deferred* Retirement Savings:

You: \$ _____ Employer match: \$ _____

Spouse: \$ _____ Employer match: \$ _____

Current Monthly *Non Tax-Deferred* Retirement Savings:

You: \$ _____

Spouse: \$ _____