Retirement Worksheet (Optional)

Desired retirement age _____.

Years until retirement _____.

Life expectancy _____.

Social Security income at retirement _____.

Expected rate of inflation _____.

Desired percentage of pre-retirement income (replacement income) _____.

Desired dollar amount of monthly retirement income _____.

Do you have specific plans to assure this desired retirement income? ❑ **Yes** ❑ **No**

Do you want to rely on Social Security? ❑ **Yes** ❑ **No**

Do you expect your taxes to be higher now or in retirement? ❑ **Yes** ❑ **No**

Do you have a good mix of qualified, non-qualified, and tax-free retirement funds? ❑ **Yes** ❑ **No**

Please describe your ideal retirement:

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