



**FINANCIAL LIFE PLAN GOAL WORKSHEET**

A well-designed Financial Life Plan can help ensure that you get the most fulfillment and peace of mind possible from the finite amount of money that you have to spend during the rest of your life. By completing this Goal Worksheet you are planning for your future by considering the actual costs of your lifestyle, along with determining what life goals you plan to fund during your retirement. Now go ahead and take a few moment to dream about your retirement.

<b><u>CLIENT NAMES</u></b>	<i>What are your names?</i> Client 1 _____ Client 2 _____
<b><u>RETIREMENT AGE</u></b>	<i>What is the age when you plan to retire?</i> Client 1 _____ Client 2 _____
<b><u>BASE LIVING EXPENSE</u></b>	<i>How much are your current monthly living expenses? (day-to-day living expenses including your food, clothes, utilities, etc.) (Make sure that you do not "double count" any of your expenses from separate goals below--healthcare, travel, automobile purchases, etc.)</i> Monthly \$ _____
<b><u>HEALTH CARE</u></b>	<i>Please list your monthly health insurance costs if (1) you will be covered by a company-sponsored retiree health plan or (2) you are currently on Medicare. (If neither 1 or 2 apply, TWD will estimate these costs for you.)</i> Client 1 \$ _____/month Client 2 \$ _____/month
<b><u>AUTOMOBILE</u></b>	<i>How often do you purchase automobiles and how much do you typically spend on your automobiles (after trade-in)?</i> Client 1 Next Purchase (year) _____ Frequency _____ years Amount \$ _____ Client 2 Next Purchase (year) _____ Frequency _____ years Amount \$ _____
<b><u>TRAVEL</u></b>	<i>How much would you like to budget for annual travel expenses?</i> Amount \$ _____
<b><u>OTHER #1</u></b>	<i>Anything else that is expensive and important? If yes, please describe:</i> Start Year _____ Frequency _____ years Amount \$ _____
<b><u>OTHER #2</u></b>	<i>Anything else that is expensive and important? If yes, please describe:</i> Start Year _____ Frequency _____ years Amount \$ _____
<b><u>OTHER #3</u></b>	<i>Anything else that is expensive and important? If yes, please describe:</i> Start Year _____ Frequency _____ years Amount \$ _____