

Retirement Goal Setting Sheet

Name

Date

1. Retirement Age Goal

Current Age

Desired Retirement Age

2. Financial Goal

Target Retirement Savings (\$)

Expected Annual Living Expenses (\$)

3. Sources of Retirement Income

Pension

Social Security

Investments

Other

4. Bucket List / Goals in Retirement

List your goals, dreams, or activities for retirement

5. Notes / Action Steps