

# Retirement Savings Strategy Template

## Personal Information

Full Name

Enter your name

Current Age

Target Retirement Age

## Financial Overview

Annual Income (\$)

Estimated Annual Expenses (\$)

Current Retirement Savings (\$)

## Retirement Goals

Desired Annual Retirement Income (\$)

Planned Years in Retirement

## Investment Strategy

Risk Tolerance

 Select... ▾

Preferred Investment Types

e.g. 401(k), IRA, Index Funds

Expected Average Annual Return (%)

## Notes

Any additional considerations or strategies...

## Milestones & Review

### Set Key Milestones

e.g. reach \$100,000 by age 40, review plan annually

### Checklist

- Review savings and investments annually
- Adjust contributions as income/expenses change
- Rebalance portfolio as needed
- Monitor progress toward milestones