

Retirement Savings Strategy Template

Personal Information

Full 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

Preferred Investment Types

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