

Simple Retirement Planning Worksheet

Personal Information

Name

Current Age

Desired Retirement Age

Current Financial Status

Current Retirement Savings (\$)

Monthly Contribution (\$)

Expected Annual Return (%)

Retirement Goals

Desired Annual Income in Retirement (\$)

Planned Years in Retirement

Additional Notes

Other Considerations (Healthcare, Social Security, etc.)

Summary (For Your Notes):

E.g., Need to increase monthly saving by \$____ or adjust retirement age.