

Structured Retirement Timeline Planner

1. Current State

Age

Current Savings (\$)

Current Annual Income (\$)

Annual Expenses (\$)

2. Retirement Goals

Target Retirement Age

Target Savings at Retirement (\$)

Expected Annual Income Need (\$)

Describe Your Retirement Vision

3. Milestones & Key Dates

Milestone 1 Date

Milestone 1 Description

Milestone 2 Date

Milestone 2 Description

4. Action Steps

List Action Steps to Achieve Retirement

5. Notes & Adjustments

Additional Notes or Adjustments