

Personal financial goal planning worksheet

Use this worksheet to aid you in your financial planning conversations. It is designed to help you and your financial advisor evaluate your current financial situation and future income goals.

Do you have an emergency fund established?

YES NO

Balance: _____

Would this supplement your income for six months:

YES NO

List your main sources of retirement income and balances:

1. _____
2. _____
3. _____
4. _____
5. _____

Define your long-term savings goals

1. At what age do you plan to retire?

2. If you have a partner or spouse, when do they plan to retire?

3. Do you plan to relocate for your retirement years?

4. Will you be helping any minors fund their higher education?
YES NO
5. If yes, have you investigated college savings options like a 529 plan?
YES NO
6. Do you wish to leave money to a charity as part of your legacy?
YES NO

Do you have the following documents?

- Will/Trust
- Durable Power of Attorney
- Letter of Intent (Funeral and Last Wish Directives)
- Healthcare proxy
- Living will
- Guardianship designations

Do you currently work with a CPA or Estate Planning Attorney?

CPA Name: _____

Attorney Name: _____

Select your top three financial concerns?

- Social Security planning
- Retirement savings/Income planning
- Investments
- Taxes
- Wealth transfer
- Other (please describe):

Do you understand how a Stretch IRA works?

YES NO

Has anyone in your family mentioned a Stretch IRA?

YES NO

Do you wish to leave IRA money to children who are minors?

YES NO

