

**RETIREMENT PLANNING WORKSHEET
CONFIDENTIAL**

PERSONAL INFORMATION

LAST NAME	FIRST NAME	EMPLOYER	BIRTHDATE
	Mike		
	Joy		

Address	City	Postal Code	Email	Phone

<u>INCOME PARTICULARS</u>	Amount	Amount	NOTES
	Mike	Joy	
Gross Employment			
Investment Income/Year			
Rental Income/Year			
Pension Income/Year			
Other -			
TOTAL INCOME PER MONTH			

OBJECTIVES & GOALS

SHORT TERM (1 TO 3 Years)
(1)
(2)
(3)
LONG TERM (4 to 8 Years)
(1)
(2)
(3)

FINANCIAL INDEPENDENCE AND ESTATE ANALYSIS

Projected Retirement Date: _____
 Expected Pension at Retirement Date: _____
 Annual Income Required During Retirement: _____
 Annual Income Required by Survivor/Beneficiary* as at the present date: _____

*(Survivor Beneficiary could be a Spouse, Partner, or dependent - please specify)

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