

retirement worksheet

Where are we at and more importantly, where are we going?

Estimated years to retirement (A).....
 Estimated years in retirement (B)
 Desired annual income in retirement (C)
 Retirement fund needed (BxC) (D)

Your present situation

Superannuation
 Savings (excluding home equity)
 Shares
 Equity (investment properties etc)
 Other
 Today's total assets (E).....
 Retirement shortfall (D-E) (F).....
 Amount per year (F/A) (G)
 Amount per week (G/52 weeks)
 Your affordable weekly contribution

The purpose of this worksheet is to determine your current financial situation. In no way should the findings of this worksheet be interpreted as any form of financial advice.

Assets not utilised in wealth plan Tax \$.....
 Equity \$.....

What are your options?

BANKS
 SHARES
 PROPERTY
 OTHER