

Name: _____

1. When would you like to retire?

- In one year
- In two years
- In five years
- In ten years

Great! What's your plan to achieve this goal?

2. How much money do you need monthly to retire comfortably?

- \$1,000
- \$2,000
- \$3,000
- \$5,000 or more

Great! What's your plan to receive this monthly income?

3. How much money do you need to invest at a 6% return to receive your desired monthly income? (Take your answer from question #2 and multiply by 200.)

Great! What's your plan to accumulate this money?