



What I Want in Retirement

The following worksheet can be used to evaluate your goals for retirement. In each section briefly describe what you want in the short term and long run. Try not to ask either too little or too much of yourself. Think about what would be most enjoyable for you and what would be possible for you to do.

Financial Goals – How can I spend my resources to give me the most satisfaction?	Leisure Time Goals – How do I want to spend my time?
Short Term:	Short Term:
Approx. Cost:	Approx. Cost:
Long Run:	Long Run:
Approx. Cost:	Approx. Cost:
Living Arrangement Goals – What living arrangements would support my desired lifestyle?	Health & Well Being Goals – More insurance, less insurance, exercise program, special diet?
Short Term:	Short Term:
Approx. Cost:	Approx. Cost:
Long Run:	Long Run:
Approx. Cost:	Approx. Cost: