



Retirement Vision Worksheet

This worksheet is designed to help you clarify your retirement vision. Answer these questions honestly — there are no wrong answers. The more specific you are, the more powerful your financial plan will be.

1. What Age Do You Want to Retire?

- My ideal retirement age is:
- Why this age?

2. What Will Retirement Look Like Day-to-Day?

- Where will you live?
- What activities will fill your time?
- Will you travel? How often?

3. How Much Will You Need Annually?

- Estimated annual retirement expenses: \$
- Will you have any ongoing debt or financial obligations?

4. Will You Work or Volunteer in Retirement?

- Would you like to work part-time or consult? Yes No
- What type of work or volunteering would you enjoy?

5. Your Retirement Vision Statement

Using your answers above, write a short paragraph describing your ideal retirement life.