Instructor: Ed Pagan

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Personal Pre - Retirement Planning Worksheet

Name ________________________________________  Date _______________

Time Frame:
▪ Present Age  = ________________
▪ Desired Retirement Age  = ________________
▪ Years To Retirement = Desired Retirement Age – Present Age = _____ – _____ = ______
▪ Expected Years in Retirement = 90 – Desired Retirement Age = 90 - ______ = ______

$$ Amounts:
▪ Annual Retirement Income Goal in Today’s Dollars  = ________________
▪ Estimated Social Security Income = ________________
▪ Estimated Pension Income = ________________

Planificacion Fianciera-English Handouts
Current Savings & Investments = ______________

**Returns:**
- Expected Rate of Return on Investments Before Retirement = __________
- Expected Rate of Return on Investments During Retirement = __________