



## Joy of Money Worksheet

# “RETIREMENT SUMMARY CHART”

Start with figuring out what you can invest right now and getting those accounts up and running. Then we ballpark your retirement needs and estimate any gap between your projected savings and future needs.

**Planned Years to Retirement / Year of Retirement**

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**Retirement Savings Goal**

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**Projected Retirement Savings**

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**Retirement Savings Gap**

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**My Tax-Advantaged Retirement Account or Account(s):**

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