



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

Retirement Savings Goal

\$ _____

Projected Retirement Savings

\$ _____

Retirement Savings Gap

\$ _____

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