Personal financial goal planning worksheet

Use this worksheet to aid you in your financial planning conversations. It is designed to help you and your financial advisor evaluate your current financial situation and future income goals.

Do you have an emergency fund established?

YES NO

Balance: ______________________________

Would this supplement your income for six months:

YES NO

List your main sources of retirement income and balances:

1. ____
2. ____
3. ____
4. ____
5. ____

Define your long-term savings goals

1. At what age do you plan to retire?

   ____

2. If you have a partner or spouse, when do they plan to retire?

   ____

3. Do you plan to relocate for your retirement years?

   ____

4. Will you be helping any minors fund their higher education?

   YES NO

5. If yes, have you investigated college savings options like a 529 plan?

   YES NO

6. Do you wish to leave money to a charity as part of your legacy?

   YES NO

Do you have the following documents?

- ☐ Will/Trust
- ☐ Durable Power of Attorney
- ☐ Letter of Intent (Funeral and Last Wish Directives)
- ☐ Healthcare proxy
- ☐ Living will
- ☐ Guardianship designations

Do you currently work with a CPA or Estate Planning Attorney?

CPA Name: ____

Attorney Name: ____________________________________

Select your top three financial concerns?

- ☐ Social Security planning
- ☐ Retirement savings/Income planning
- ☐ Investments
- ☐ Taxes
- ☐ Wealth transfer
- ☐ Other (please describe):

  ____

Do you understand how a Stretch IRA works?

YES NO

Has anyone in your family mentioned a Stretch IRA?

YES NO

Do you wish to leave IRA money to children who are minors?

YES NO

Make an inventory of your beneficiaries to organize your distribution planning

As your goals and financial situation change, you should review this information with your financial advisor.

Account/Policy Title	Beneficiary	Contingent Beneficiary

This worksheet does not constitute a beneficiary designation for any Putnam IRA. Please contact Putnam to change or designate a beneficiary on your Putnam IRA.

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