Name:

Date:

Investment Goals Worksheet

1. How much money (per year) would it take to live comfortably today?
2. How many years from now do you expect to retire?\*

*\*You must choose between a minimum of 20 years and a maximum of 50.*

1. Based on the time from now that you want to retire, what will be the extent of inflation? Will things cost twice as much, or more?

*Circle one:*

20 years from now, things will cost **twice** as much.

30 years from now, things will cost **three** times as much.

40 years from now, things will cost more than **four** times as much.

50 years from now, things will cost about **six** times as much.

1. Considering what you circled for your answer to number three and what you put as your answer for number one, how much money will you need to live comfortably when it comes time to retire? Do your math below, show your work!

\*The equations is simple, just multiply the dollar amount you answered with on number one by the amount in **bold** on number three.

*\*\*Example if you only need $10,000 to live comfortably today, and you want to retire in 30 years, here is your equation: $10,000 x 3 = $30,000 needed in retirement*