

# Making End\$ Meet Lifetime Savings Plan Worksheet

Name: \_\_\_\_\_

Birth Year: \_\_\_\_\_

Today's Date: \_\_\_\_\_

Goal	How Much? (Annually)	Begins When?	How Often?	Life Ins. %	
1. Emergencies			4 yrs		
2. Insurance Deductible			4 yrs		
3. Home Down Payment					
4. Childbirth Expenses					
5. Business Investment Capital					
6. Sabbaticals, Makeovers					
7. Retirement					
8. Support Parents					
9. Vacations					
10. Children's Private Schooling					
11. Children's College					
12. Children's Wedding(s)					
13. Children's First Year of Marriage					
14. Children's Orthodontics					
15. Home Improvements					
16. New Vehicles					
17. High-End "Toys"					
18. Adults' Continuing Education					
19. New Furniture					
20. Computer Upgrades					
21. Voluntary Mortgage Balloon Payment					
22					
Starting Balance: \$ _____	Inflation: _____ %		Early	Midlife	Late
Living Expenses: \$ _____					
Mortgage Balance: \$ _____		Age Brackets:			
Mortgage Payment: \$ _____ (P&I Only)					
Mortgage Interest: _____ %	Annual Avg. ROI Desired:				