

RETIREMENT GOALS

Name

Date

1. Current Pre-Tax Income

Completed

You

Spouse

2. Planned Retirement Age

Completed

You

Spouse

3. Percentage of Pre-Tax Income Required in Retirement

Completed

You

Spouse

4. At What Age Do You Plan to Receive CPP Benefits

Completed

You

Spouse

5. At What Age do You Expect to Receive OAS Benefits

Completed

You

Spouse

6. What is Your Expected Rate of Return on Your Investments Pre-Retirement

Completed

You

Spouse

7. What is Your Expected Rate of Return on Your Investments Post-Retirement

Completed

You

Spouse

9. What is Your Expected Inflation Rate

Completed

You

Spouse
