



Retirement Readiness and Income Planning Worksheet

Session 6 - Retirement Readiness and Income Planning | Participant Resource | Version 1.0

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

What should resources support?

- ☐ Essential living needs ☐ Housing ☐ Healthcare
☐ Family or caregiving ☐ Generosity ☐ Travel or recreation
☐ Flexibility ☐ Legacy ☐ Other: _____

Income and planning questions

Expected income sources: _____

Spending information to verify: _____

Tax or Medicare question: _____

Beneficiary or household-continuity question: _____

One to three next actions: _____

Education notice: FFES provides general financial education, not individualized investment, tax, legal, insurance, credit, mortgage, Social Security, Medicare, pension, or estate-planning advice. Rules and individual circumstances differ and can change.