



PENNY LANE
FINANCIAL

Retirement Dreamcasting

How to Identify & Create Your Dream Retirement

Retirement looks different for everyone. Americans are living longer than ever and are enjoying active, exciting retirements. This worksheet is designed to help you identify what's important to you and develop ideas for how you will use your time once you're no longer working. Please print out this worksheet and take some time to relax and think about your retirement dreams.

Who would I like to spend my time with?

What are some simple activities I enjoy every day?

What have I always wanted to do, but not enough time?

What gives me a sense of accomplishment?

What is on my bucket list?

What am I passionate about?

What gives my life purpose?

Where would I like to spend most of my time?

What would I like more of in my life?

How will I stay active and healthy?

What skills have I gained that might be valuable in a second career or volunteer works?



If you have any questions or would like help with this worksheet, please call us at 253-327-1177. We would be happy to meet with you for a no-obligation consultation. Retire happy and confident.

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Personal Monthly Budget

| | | | | |
|------------------|---------------------|----|---------------|----|
| Monthly Income: | Income 1 | \$ | | |
| | Income 2 | \$ | | |
| | Extra Income | \$ | Total Income: | \$ |
| Housing: | Mortgage/Rent | \$ | | |
| | Phone | \$ | | |
| | Electricity/Gas | \$ | | |
| | Water/Sewer/Garbage | \$ | | |
| | Cable | \$ | | |
| | Maint/Supplies | \$ | | |
| | Other | \$ | Subtotal: | \$ |
| Transportation: | Vehicle Payment(s) | \$ | | |
| | Insurance | \$ | | |
| | Licensing | \$ | | |
| | Fuel | \$ | | |
| | Maintenance | \$ | Subtotal | \$ |
| Insurance: | Home | \$ | | |
| | Health | \$ | | |
| | Life | \$ | | |
| | Other | \$ | Subtotal | \$ |
| Food: | Groceries | \$ | | |
| | Dining Out | \$ | Subtotal | \$ |
| Pets: | Food | \$ | | |
| | Other | \$ | Subtotal | \$ |
| Personal Care: | Hair/Nails | \$ | | |
| | Clothing | \$ | | |
| | Health Club | \$ | | |
| | Other | \$ | Subtotal | \$ |
| Entertainment: | Movie/Events | \$ | | |
| | Other | \$ | Subtotal | \$ |
| Loans: | Personal | \$ | | |
| | Credit Card(s) | \$ | | |
| | Other | \$ | Subtotal | \$ |
| Gifts/Donations: | Charity(s) | \$ | | |
| | Other | \$ | Subtotal | \$ |
| Legal | Attorney | \$ | | |
| | Other | \$ | Subtotal | \$ |
| | | | Total Outgo: | \$ |
| | | | Total Income: | \$ |
| | | | Difference: | \$ |

