**Road Map to Financial Happiness** Stanley Financial Services, LLC

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**Your Name:** ____ **Date Prepared:** ____

| Col 1<br>Year | Col 2<br>Age | Col 3<br>Total Monthly Expenses | Col 4<br>Income Sources a-h below | Col 5 | Col 6 | Col 7<br>Total Monthly Income | Col 8<br>Events (move/start SS/RMD/etc) |
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| Musts: | Sources of Income | Monthly or Total | Stuff to Consider | Things to be Careful of |
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| Track Expenses | a - Employment | | Where will I live? | Annuities |
| Emergency Fund | b - Pension | | Need life insurance? | Commission salesmen |
| Pay off credit cards monthly | c - Social Security | | Healthy beats Wealthy | "Senior Advisors" |
| Net Worth Statement | d - RMD-age 70.5 | | Bucket List! | Savings not all cash |
| Balanced Portfolio/Rebalance | e - Savings | | My Legacy? | Investment include % of stocks |
| Five years worth of cash | f - Investments | | How spend free time? | Things you do not understand |
| Five years - plan again | g - Retirement funds | | Keep socially active! | Timeshares |
| Common Sense | h - Other | | Keep physically active! | Priorities/What'sImportant |