The *Relaxing* Retirement Coaching Program™

The Retirement *Confidence* Creator™

Name: ____

Date: ________ /________ /________

The *Relaxing* Retirement Coach, Inc.

Information/Comments You Would Like to Share

Your Timeline of Important Dates

Year	Name (DOB___/___/_____)	Name (DOB___/___/_____)

The Retirement Income Predictor™

Monthly Inflow						
Name	**Source**	**Income Begin Date**	**Income End Date**	**Monthly *(Pre-Tax)* Amount of Income**	**Annual *(Pre-Tax)* Amount of Income**	**Cost of Living Adjustment**
	Work Income (total pre-tax)			$	$	☐ Yes ☐ No
	Work Income (total pre-tax)			$	$	☐ Yes ☐ No
	Work Income (total pre-tax)			$	$	☐ Yes ☐ No
	Work Income (total pre-tax)			$	$	☐ Yes ☐ No
	Social Security (total pre-tax/pre-medicare)			$	$	☐ Yes ☐ No
	Social Security total pre-tax/pre-medicare)			$	$	☐ Yes ☐ No
	Pension (total pre-tax)			$	$	☐ Yes ☐ No
	Pension (total pre-tax)			$	$	☐ Yes ☐ No
	Pension (total pre-tax)			$	$	☐ Yes ☐ No
	Pension (total pre-tax)			$	$	☐ Yes ☐ No
	Rental (total gross)			$	$	☐ Yes ☐ No
	Rental (total gross)			$	$	☐ Yes ☐ No
	Rental (total gross)			$	$	☐ Yes ☐ No
	Rental (total gross)			$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
				$	$	☐ Yes ☐ No
Monthly Inflow Totals:				**$**	**$**	

The Lifestyle Cost Estimator™

Average Monthly/Annual FIXED Expenses		
	Monthly	**Annually**
Home		
Mortgage (Principal and Interest Only)	$	$
Mortgage (Principal and Interest Only)	$	$
Home Equity Line of Credit (Minimum Payment Due)	$	$
Rent	$	$
Real Estate Taxes	$	$
Residence Fee (Condominium fee)	$	$
Oil / Gas	$	$
Electric	$	$
Water / Sewer	$	$
Cable TV / Internet / Telephone	$	$
Smart Phone (Cell)	$	$
Home Repair / Maintenance (Annual Allotment)	$	$
Landscaping / Lawn Care	$	$
Snow Removal	$	$
Trash Removal	$	$
House Cleaning	$	$
Subtotal (Home)	$	$
Transportation		
Gas / Fuel	$	$
Lease / Loan / Future Auto Purchases	$	$
Lease / Loan / Future Auto Purchases	$	$
Car Wash / Detailing Services	$	$
Excise Tax	$	$
Repairs / Maintenace	$	$
Parking / Public Transportation / Fast Lane	$	$
Boat Expenses	$	$
Subtotal (Transportation)	$	$
Fixed Expenses (Page 4)	$	$

The Lifestyle Cost Estimator™

Average Monthly/Annual FIXED Expenses		
	Monthly	Annually
Personal Consumption		
Groceries	$	$
Clothing (Fixed) including eye glasses, shoes, undergarments, coats, etc.	$	$
Dry Cleaning	$	$
Haircuts / Salon	$	$
Health / Personal Care Products (CVS, Walgreens, etc.)	$	$
Sports / Fitness / Health Club / Membership Fees	$	$
Chiropractic Care	$	$
Massage Treatments	$	$
Vitamins	$	$
Medical / Dental / Pharmacy (Out of Pocket)	$	$
Pet Expenses (Food, Cleaning, Veterinary)	$	$
Professional / Advisor Fees (Accountant, Attorney, etc.)	$	$
Rental Property Expenses (Total)	$	$
Vacation / Second Home Expenses (Total)	$	$
	$	$
	$	$
	$	$
Subtotal (Personal Consumption)	$	$
Insurance		
Auto	$	$
Home	$	$
Umbrella	$	$
Life	$	$
Long Term Care	$	$
Health	$	$
Boat	$	$
Medicare Deduction	$	$
Subtotal (Insurance)	$	$
Fixed Expenses (Page 5)	$	$

The Lifestyle Cost Estimator™

Average Monthly/Annual DISCRETIONARY Expenses		
	Monthly	**Annually**
Books	$	$
Charitable Donations *(Non-Religious)*	$	$
Charitable Donations *(Religious)*	$	$
Clothing *(Discretionary)* including jewelry, hats, athletic attire, etc.	$	$
Entertaining / Hosting Parties	$	$
Gifting / Support	$	$
Hobbies	$	$
Liquor (beer, wine, spirits, mixers, etc.)	$	$
Magazine Subscriptions	$	$
Meals Out (Breakfast, Coffee)	$	$
Meals Out (Lunch)	$	$
Meals Out (Dinner)	$	$
Movies / Theatre	$	$
Movie Rentals / Netflix / Amazon	$	$
Music / Satellite Radio	$	$
Newspapers	$	$
Postage / Overnight Delivery	$	$
Presents (Anniversaries, etc.)	$	$
Presents (Birthdays)	$	$
Presents (Holidays)	$	$
Salon / Personal Care (Discretionary)	$	$
Theatre / Sporting Events	$	$
Vacations / Travel	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
Total Discretionary Expenses	$	$
Grand Total Expenses	$	$

The Lifestyle Cost Estimator™

Future Large Expenses		
In addition to your average monthly and annual expenses, over the next five (5) years, where will you be spending money?		
	Anticipated Project Year	**Projected Cost**
Home Improvements		
		$
		$
		$
		$
		$
		$
Furniture		
		$
		$
		$
Appliances		
		$
		$
		$
New Home		
		$
New Vacation Home		
		$
Special Vacations/Events/Weddings *(Outside of Annual Spending)*		
		$
		$
Cars, Boats, etc....		
		$
		$
		$
Short Term Debt		
		$
Total Future Large Upcoming Expenses		$

The Lifestyle Cost Estimator™
Notes

The Retirement Resource Quantifier™

Retirement Bucket - Bank Accounts					"Non-Qualified"
Retirement Bucket - Bank Accounts					
Statement Enclosed	**Institution**	**Type of Account**	**Owner**	**Maturity Date**	**Account Value**
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
Non-Qualified (Page 9)					$

The Retirement Resource Quantifier™

Retirement Bucket - Investments			"Non-Qualified"
Brokerage Accounts (Non IRA)			
Statement Enclosed	Institution	Owner	Account Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Mutual Funds - Direct (Non IRA)			
Statement Enclosed	Institution	Owner	Account Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Non-Qualified (Page 10)			$

The Retirement Resource Quantifier™

Retirement Bucket - Investments					"Non-Qualified"
Individual Stocks - Direct (Non Brokerage)					
Statement Enclosed	Institution	Owner	Symbol	# of Shares	Value
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$
☐					$

Options						
Statement Enclosed	Institution	Owner	Symbol	ISO/Non-Q	# Shares	Bargain Element
☐						$
☐						$
☐						$
☐						$
☐						$

Bonds - Direct (Non Brokerage)				
Statement Enclosed	Institution	Owner	Account Type	Value
☐				$
☐				$
☐				$
☐				$
Non-Qualified (Page 11)				$

The Retirement Resource Quantifier™

Retirement Bucket - Investments				"Non-Qualified"
Annuities				
Statement Enclosed	Institution	Owner	Fixed/Variable	Value
☐				$
☐				$
☐				$
☐				$
☐				$
☐				$
☐				$
☐				$
☐				$
Life Insurance Cash Values				
Statement Enclosed	Institution	Owner	Fixed/Variable	Value
☐				$
☐				$
☐				$
☐				$
☐				$
☐				$
☐				$

Notes Receivable

Statement Enclosed	Borrower	Original Date	Original Amount	Current Balance	Rate	Term
☐						
☐						
☐						
Non-Qualified (Page 12)						$

The Retirement Resource Quantifier™

Retirement Bucket - Investments			"Qualified"
IRA - Traditional			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
IRA - Rollover			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
IRA - Roth			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Qualified (Page 13)			$

The Retirement Resource Quantifier™

Retirement Bucket - Investments			"Qualified"
401(k)			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
403(b)/TSA			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
457/MA DCP			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
Lump Sum Pension			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
Qualified (Page 14)			$

The Retirement Resource Quantifier™

Retirement Bucket - Investments			"Qualified"
SEP-IRA			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Simple IRA			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Profit Sharing / Money Purchase			
Statement Enclosed	Institution	Owner	Value
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Qualified (Page 15)			$

The Retirement Resource Quantifier™

Non-Retirement Bucket - Personal Assets		
Personal Asset *(Home, Auto, Boat, etc.)*		
Description	**Owner**	**Value**
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
Personal Assets		$

Non-Retirement Bucket - Liabilities			
Liabilities *(Residential Mortgage, Home Equity Line of Credit, Car Loans, etc.)*			
Statement Enclosed	**Decription (with rate, term)**	**Owner**	**Balance**
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
☐			$
Liabilities			$

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