

Retire Ready – Mind Your Gap Worksheet

Investment Assets:		
Name of Investment Asset	Owner	Value
Total Investment Assets:		\$
Liabilities:		
Name	Owner	Value
Total Liabilities:		\$
Your Net Worth:		\$

Retirement Gap Analysis

Total Retirement Costing	\$
Less Net Worth from above	\$
Retirement Gap / Retirement Excess	\$

#1 Enter all your assets that you anticipate will be used to fund your retirement. Do not include lifestyle assets. Total all your investment assets.

#2 Enter all your liabilities. Total all your liabilities.

#3 Deduct your total liabilities from your total investment assets.

#4 Add total retirement costing completed from previous worksheet.

#5 Add your net worth.

#6 Deduct your retirement costing from your net worth and you have your gap or excess.