

FUTURE ME:

From Retirement Dreams to Financial Goals

What do you want your financial future to look like? Take a few minutes to picture your future self and create a simple roadmap to help you get there.

My Retirement Vision

Target Retirement Age: What age would you like to retire?

What does your ideal retirement look like?

Think about the lifestyle you want, where you'd like to live, how you'll spend your time, and the hobbies, interests, or activities you'd like to enjoy.

Dream Destinations: What are 2-3 places you would like to visit or spend time?

Bucket List Items: What experiences, adventures or personal goals do you want to accomplish?

Retirement Reflection

My Retirement Cost:

What do you think you'll need financially each year to support your retirement?

My Current Plan:

What are you doing to prepare for retirement? Think about savings, contributions, investments, and future income.

Opportunity to Improve: What is one area of your retirement planning you could strengthen?

- ☐ Increase retirement contributions
- ☐ Build my savings
- ☐ Review my investment strategy
- ☐ Learn about my retirement benefits

Explore Your Retirement Future

Use the Voya or Manulife Retirement Calculator to see how your current plan compares with the retirement you envision.

My Retirement Takeaway: What did you learn about your retirement readiness?

My Future Me SMART Goal

Choose one area you'd like to improve and create a SMART goal to help you move toward

My Goal: What specific financial action will I take?

S

SPECIFIC

What specific retirement or financial action will you take?

Example: Increase my retirement contribution.

M

MEASURABLE

How much will you save, contribute, or increase?

Example: Increase my contribution by 1%.

A

ACHIEVABLE

What can you realistically commit to right now?

Example: A 1% increase fits within my current budget.

R

RELEVANT

How will this action help you reach the retirement you envision?

Example: It will help me build more retirement savings over time.

T

TIME-BOUND

When will you start or reach your goal?

Example: Starting with my next paycheck.