

✓ If Joe retires at 65 and Jane is retired, your money must last 29 years in retirement

✓ Create your Goals.

Select your Goals by dragging them into the box below and dropping them into the appropriate section as a Need, Want or Wish. Reorder your goal's importance level by dragging and dropping them in the desired order of importance (we've already added the Basic Living Expense Goal for you). Then click each Goal to enter the information that makes it unique to you.

Options

Begin with the most popular Goals: [Auto Goals](#) ? Change Goal Entry method: [Switch](#)



Travel



Car



Leave Bequest



Celebration



Private School



College



Provide Care



Major Purchase



Wedding



Start Business



New Home



Other



Gift or Donation



Home Improvement

Joe & Jane's Goals

[Timeline](#) [Hide Detail](#)

Needs



Retirement - Basic Living Expense

Joe (2025)	65
Jane (2025)	65
Both Retired (2025-2051)	\$67,998
Jane Alone Retired (2052-2053)	\$54,398



Health Care



Both Medicare (2025-2051)	\$12,233
Jane Alone Medicare (2052-2053)	\$6,016

Wants



Travel



When both are retired \$5,000
Recurring every year for a total of 10 times



New Home



When both are retired \$300,000

Wishes



Leave Bequest



End of Joe's plan \$100,000