



How Much Is Enough?

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Instructions:

To live “the Good Life” you want for your future, you need to consider whether you have the financial resources to live the lifestyle you envision. Answer the following questions.

1. Do you have “enough” to live in the place you envision?

Yes No Unsure

2. Do you want or need to “work” in the future to create income?

Yes No Unsure

How much? _____

3. How much do you need to earn per year to support your lifestyle in the future compared to your current income?

Same More Less

How much? _____

4. How many years do you need to earn that much before you could stop working entirely—if you wanted/choose to?

Less than 5 years More than 5 years Unsure

How long? _____

5. Do you have a financial advisor who can help you determine “how much is enough?”

Yes No Unsure

