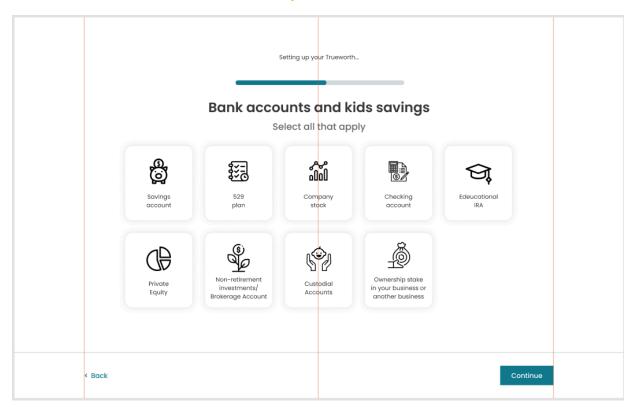
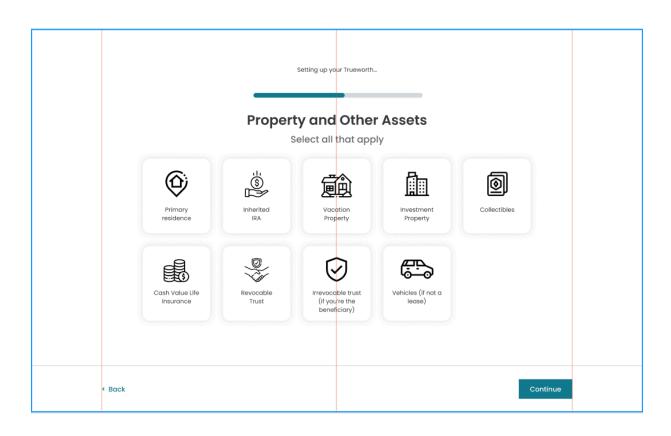
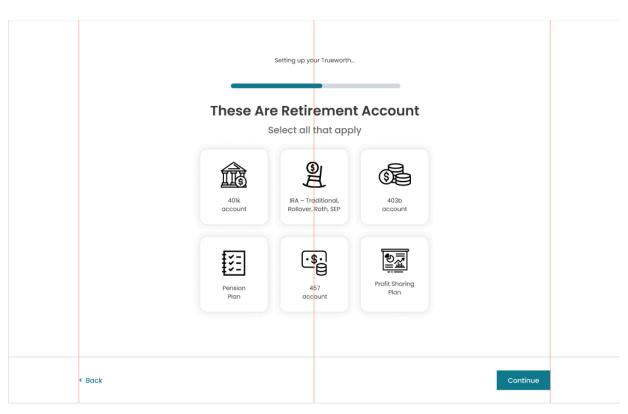
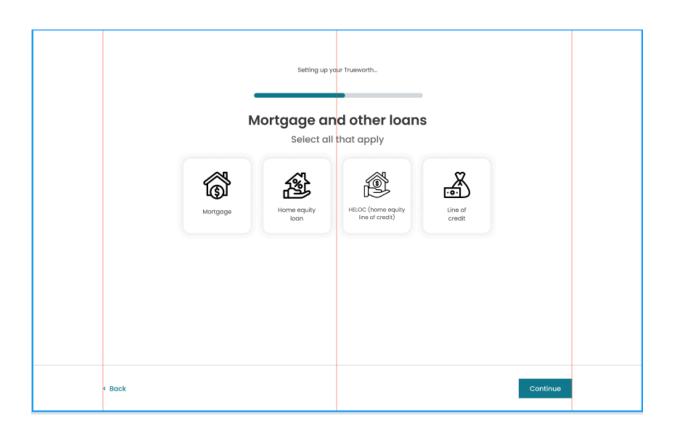
- 1. How prepared are you for retirement financially? Scale of 1 to 5
- 2. Compared to today how do you see you lifestyle in retirement.
- 3. 60% 80% 100% 120% 140%
- 4. [I did not appreciate how much if need in retirement for living expenses. Thank goodness I was able to save while in my early job] —social proof
- 5. What percent of your income do you save towards retirement?
- 6. How much have you currently saved in your retirement accounts (401k IRA etc) best estimate
- 7. I retired early to race cars | I loved to work so I worked until I was thrown out haha I'm 82] —social proof
- 8. At what max age do you wish to retire 65 | 67 | 70 | 75+
- 9. When were you born? Drop-down of years (with checker for reasonable between 80yrs ago and 14 years ago
- 10. Generate Preliminary Retirement Target results
- 11. User then clicks Next. The next series of items is to get to understand the Usr's assets and debt picture. I am adding a Figma link that shows the different sets of questions:
- 12. https://www.figma.com/file/SQ7JrOwP8FjdLQJ8Jtz25F/Architect-Version? node-id=0%3A1&t=w5VIEEJNmfj52MOO-3

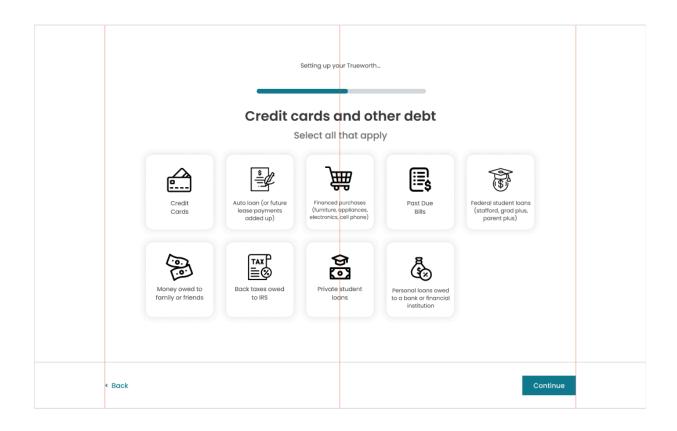






I was so much n debt before trying the 50/30/20 approach to budgeting. Saved my life! — Add Social Proof / NEXT





- 1. Add Social Proof Once I knew where I was spending my money it was much easier to cutback on things that I didn't really need NEXT
- The next set of questions are to understand how much you spend on different types of expenses each MONTH - Use best estimate if you don't know exact. NEXT
- 3. NEEDS
- 4. Housing Expense (Mortgage | Rent | plus Renters Insurance Month Property Tax )
- 5. Transportation Expense (Total your monthly car payments | auto insurance |)
- 6. Gas fuel
- 7. Healthcare Expense (Health Insurance premium | out of pocket medical expense, HSA) for the month
- 8. Life insurance premium for month
- 9. Utilities for month (electricity | Water | Gas | Trash)
- 10. Groceries | Toiletries | Beauty and Haircuts
- 11. Cellphone
- 12. Chilcare
- 13. Student loans
- 14. Credit Card payments
- 15. Other loan payment
- 16. What is total minimum payments on all your loans)
- 17. Child support and alimony
- 18. WANTS
  - 1. Clothing and Jewelry
  - 2. Eating out | Steaks etc for the grill
  - 3. Movie concert and event tickets
  - 4. Gym or club membership
  - 5. Travel expenses (airlines, hotels, rental cars)
  - 6. Cable, Netflix, streaming packages
  - 7. Beauty selfcare (Spa, hair, pedicure, barber)
  - 8. Other miscellaneous