


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>


Setting up your Truworth...

Bank accounts and kids savings


Select all that apply




Savings account




529 plan




Company stock




Checking account




Educational IRA




Private Equity



Non-retirement investments/
Brokerage Account



Custodial Accounts




Ownership stake in your business or another business


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Setting up your Truworth...


Property and Other Assets


Select all that apply



Primary residence



Inherited IRA



Vacation Property



Investment Property


Collectibles


Cash Value Life Insurance


Revocable Trust


Irrevocable trust
(if you're the beneficiary)



Vehicles (if not a lease)


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Setting up your Truworth...


These Are Retirement Account


Select all that apply



401k account


IRA – Traditional, Rollover, Roth, SEP


403b account


Pension Plan


457 account


Profit Sharing Plan


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


Setting up your Truworth...

Mortgage and other loans


Select all that apply




Mortgage



Home equity loan



HELOC (home equity line of credit)



Line of credit


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Setting up your Truworth...

Credit cards and other debt


Select all that apply




Credit Cards




Auto loan (or future lease payments added up)




Financed purchases (furniture, appliances, electronics, cell phone)




Past Due Bills




Federal student loans (stafford, grad plus, parent plus)




Money owed to family or friends



Back taxes owed to IRS



Private student loans



Personal loans owed to a bank or financial institution

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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
2. 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. Childcare
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