



PRIVATE
FAMILY
BLUEPRINT

Helping Families STOP Starting Over.

The RETIREMENT CONFIDENCE REVIEW™

Planning Today for Peace of Mind Tomorrow

Retirement is more than a number—it's the freedom to live your life on your terms.
This review helps you take a clear look at where you are, what may be missing,
and what actions can help you retire with confidence. ♥

SCHEDULE YOUR
30-MINUTE REVIEW



Understanding your FEGLI:
Coverage Review

1 ABOUT YOU



Name: _____ Date: _____

Age: _____ Retirement Goal Age: _____

Marital Status: ☐ Single ☐ Married ☐ Divorced ☐ Widowed

Number of Dependents: _____ Ages: _____

2 YOUR RETIREMENT VISION



How do you picture your ideal retirement?

What matters most to you in retirement?

3 FINANCIAL CONFIDENCE CHECK

Rate your confidence in each area.

Very Confident Somewhat Confident Unsure Not Confident



	I have enough saved for retirement.	☐	☐	☐	☐
	My income will be enough to maintain my lifestyle.	☐	☐	☐	☐
	I understand my employer benefits in retirement.	☐	☐	☐	☐
	I understand my healthcare options and costs.	☐	☐	☐	☐
	My family will be financially protected.	☐	☐	☐	☐
	I have a plan for taxes in retirement.	☐	☐	☐	☐
	I have an estate plan in place.	☐	☐	☐	☐
	I feel confident that my retirement plan is on track.	☐	☐	☐	☐

4 INCOME SOURCES IN RETIREMENT



Which income sources do you expect to use in retirement?

INCOME SOURCE	YES	NO	ESTIMATED MONTHLY INCOME
Social Security	☐	☐	\$ _____
Pension (CSRS / FERS / Other)	☐	☐	\$ _____
TSP / 401(k) / IRA / 403(b)	☐	☐	\$ _____
Annuities	☐	☐	\$ _____
Investment Income	☐	☐	\$ _____
Rental / Real Estate Income	☐	☐	\$ _____
Part-Time Work / Side Income	☐	☐	\$ _____
Other: _____	☐	☐	\$ _____

TOTAL ESTIMATED MONTHLY INCOME

\$ _____

5 RETIREMENT RISK CHECK

Check all that apply.

- ☐ Longevity risk (outliving my savings)
- ☐ Rising healthcare costs
- ☐ Inflation
- ☐ Market volatility
- ☐ Taxes
- ☐ Not having enough life insurance
- ☐ Supporting adult children or aging parents
- ☐ Other: _____

♥
Understanding
your risks is the
first step toward
building confidence
and creating
freedom.

6 WHAT GAPS DO YOU SEE?



Where do you feel the biggest gaps in your retirement plan?

- ☐ Not enough saved
- ☐ Estate planning
- ☐ Unsure if I'll have enough income
- ☐ Debt
- ☐ Healthcare costs
- ☐ Not sure where to start
- ☐ Life insurance / Family protection
- ☐ Other: _____
- ☐ Tax strategy

7 MY NEXT STEP

Small steps today create a secure tomorrow.

- ☐ Review my current savings and investments.
- ☐ Understand my employer retirement benefits.
- ☐ Explore ways to reduce or manage taxes.
- ☐ Review my life insurance and protection plan.
- ☐ Schedule my 30-minute review to create my retirement plan.
- ☐ Other: _____

“

A confident
retirement
is built on
preparation
today.

♥

8 NOTES & NEXT STEPS





IMPORTANT REMINDER

Your retirement plan should be reviewed regularly—life changes, and your plan should change with it. ♥



DID YOU KNOW?

Many people retire with less than they think they need. A plan brings peace of mind.



QUESTIONS?

I'm here to help you understand your options so you can make informed decisions for yourself and your family.



PRIVATE FAMILY BLUEPRINT
Teaching families to make confident financial
decisions before life forces difficult ones.



We believe families make their best
financial decisions when someone
takes the time to teach—not sell.

Private Family Blueprint
Educational Series

WORKSHEET 005