

## BASELINE & LONG-VIEW PLAN WORKSHEET

This worksheet helps establish a long-view plan for your financial health. Use your previous worksheets to help complete the “Your Baseline” section and then answer the questions in the “Your Long-View Plan” section. You will keep this planner for your records only. Do not submit to Employee Wellness.

DATE COMPLETED	
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### YOUR BASELINE

CURRENT ASSETS	Amount
Total of Cash Assets	
Total of Retirement Investments	
Total of Life Insurance Cash Value Benefit (enter zero if term insurance)	
Total of Other Sources of Income	
CURRENT EXPENSES AND LIABILITIES	Amount
Annual Monthly Expenses	
Total Debts (mortgage, credit cards, car payments, etc.)	
PLANNED AGE OF RETIREMENT	Age
Enter the age you plan to retire	

### YOUR LONG-VIEW PLAN

<b>My biggest challenge when it comes to finances is:</b>
<b>I will address my financial challenges by:</b>
<b>My inspiration for employing Common Cents strategies for financial success is:</b>