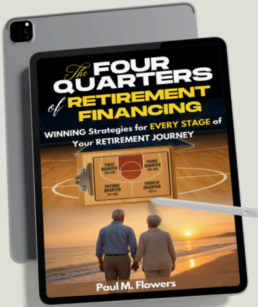





END OF FIRST QUARTER SCOREBOARD

(AGES 35-50 YEARS)

LAYING THE FOUNDATION



AM I ON TRACK?

TARGET	METRIC			
<input type="checkbox"/> 401(K)/IRA SAVINGS	4-6× ANNUAL SALARY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CREDIT CARD USAGE	<30% UTILIZATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> EMERGENCY FUND	3-6 MONTHS OF EXPENSES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> LIFE INSURANCE	5-10× ANNUAL INCOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> BUDGETING HABITS	MONTHLY PLAN IN PLACE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> INVESTMENT STRATEGY	70-90% IN EQUITIES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> DEBT REDUCTION	HIGH-INTEREST DEBTS PAID OFF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ROTH IRA CONTRIBUTIONS	REGULAR ANNUAL DEPOSITS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CAREER/ EDUCATION PATH	SKILL-BUILDING ACTIVE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> VISION FOR RETIREMENT	WRITTEN RETIREMENT DREAM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THIS EASY-TO-USE CHECKLIST HELPS YOU ASSESS YOUR RETIREMENT READINESS AT THE END OF THE FIRST QUARTER (AGES 35-50). IT HIGHLIGHTS THE KEY FINANCIAL AND LIFESTYLE METRICS YOU SHOULD BE HITTING AS YOU LAY THE FOUNDATION FOR A SECURE RETIREMENT.