Pre Retirement Investment Planning Worksheet

ASPIRE
WEALTH MANAGEMENT
is the beginning of security, prosperity and a well earned future of comfort and calm.

Term	Short Term		Medium Term			Long Term		
	1 Year	2 Year	3 Year	4 Year	5 Year	6 Year	7 Year	8 Year +
Expenses								
TOTAL								
Income								
Pension								
Rents								
Dividends								
Bank Deposit								
TOTAL								

	Short Term		Medium Term			Long Term		
	1 Year	2 Year	3 Year	4 Year	5 Year	6 Year	7 Year	8 Year +
Additional Income Required								
Investment								
Low Risk								
Medium Risk								
High Risk								
TOTAL								