

Worksheet

My Retirement Financial Planning Workbook

Current Monthly Income

Source	Amount
Pension	_____
Investments	_____
Part-time Income	_____
Other	_____

Monthly Expenses

Category	Amount
Housing	_____
Utilities	_____
Food	_____
Medical	_____
Transport	_____
Insurance	_____
Entertainment	_____
Other	_____

My Biggest Financial Concerns

- 1.
- 2.
- 3.

Future Expenses I Need To Plan For

Three Additional Income Ideas

- 1.
- 2.
- 3.

My Financial Goals

1 Year

3 Years

5 Years

Members Bonus

The Retirement Financial Prompt Pack

Include **100 practical ChatGPT prompts**, grouped into categories such as:

- Budget Planning
- Retirement Income
- Investment Questions
- Inflation Planning
- Saving Money
- Side Income Ideas
- Estate Planning
- Medical Expense Planning
- Tax Preparation
- Financial Goal Setting

You will find these membership bonuses inside:

[The Practical AI Success Toolkit](#)