Farm Retirement Income Planning Worksheet

A worksheet for planning retirement income as a farmer. It lists expected sources and needs so an advisor can help you build a realistic plan.

Farm / unit: _____ Date: _____ By: _____

Retirement goals _____

Expected farm income _____

Land rental income _____

Social Security questions _____

Savings and investments _____

Monthly living needs _____

Health care needs _____

Debts to clear _____

Advisor contact _____

NOTES / CALCULATIONS

TIP Review the worksheet with a licensed financial adviser before making retirement decisions.