

Retirement Income Plan

Household Balance Sheet

Assets

Human Capital

Continuing Career

Part-time Work

Financial Assets

Checking Accounts

Brokerage Accounts

Retirement Plans

Home Equity

Insurance & Annuities

Social Capital

Social Security

Medicare

Company Pensions

Family & Community

Liabilities

Fixed Expenses

Basic Living Needs

Taxes

Debt Repayment

Discretionary Expenses

Travel & Leisure

Lifestyle Improvements

Contingencies

Long-term Care

Health Care

Other Spending Shocks

Legacy Goals

Family

Community & Society