



# FIRE PLANNING

## WORKSHEET

*Use this sheet to determine your FI number and start planning your retirement.*



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BiggerPockets Money Show.

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# FIRE Planning Sheet

WHY do you want to retire early? (I want to ask this question, just because I want this in the recording. I want people to think about WHY they want to retire early.)

What does retirement look like? (Starting a business, working a low-paying passion job, volunteering, sitting on a beach, travel, etc.) Joining a museum to allow their schedule to fill out his social schedule.

When do you want to retire? What is your timeline? What age will you be?

Can you live out that retirement dream right now?

Have you calculated your FI number? What is your FI number? What did you base your number on? (Show your work)  
Have you run your numbers through FI calculators? ([cfiresim.com](https://cfiresim.com)) (<https://networthify.com/calculator/earlyretirement>)

How do you handle stock market declines? (Look back to March 2020, how did that feel?)

What is your risk tolerance?

How do you think about income generation from portfolio?

Where do you want to retire? How realistic is this plan?

Where do you want to live? (own, rent, nomadic travel) How much room do you need?

What is your overall health?

What is your family situation?

Do you plan to help your children with college costs? Do you have the funds to do so?