



# FIRE PLANNING

## WORKSHEET

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



Brought to you by Mindy Jensen, co-host of the  
BiggerPockets Money Show.

Get more at [BiggerPockets.com](https://www.biggerpockets.com)

# 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?

This publication is protected under the U.S. Copyright Act of 1976 and all other applicable international, federal, state, and local laws, and all rights are reserved, including resale rights: you are not allowed to reproduce, transmit, or sell this book/document in part or in full without the written permission of the publisher.

#### Limit of Liability

Although the author and publisher have made reasonable efforts to ensure that the contents of this book/document were correct at press time, the author and publisher do not make, and hereby disclaim, any representations and warranties regarding the content of the book/document, whether express or implied, including implied warranties of merchantability or fitness for a particular purpose. You use the contents in this book/document at your own risk. Author and publisher hereby disclaim any liability to any other party for any loss, damage, or cost arising from or related to the accuracy or completeness of the contents of the book/document, including any errors or omissions in this book/document, regardless of the cause. Neither the author nor the publisher shall be held liable or responsible to any person or entity with respect to any loss or incidental, indirect, or consequential damages caused, or alleged to have been caused, directly or indirectly, by the contents contained herein. The contents of this book/document are informational in nature and are not legal or tax advice, and the authors and publishers are not engaged in the provision of legal, tax or any other advice. You should seek your own advice from professional advisors, including lawyers and accountants, regarding the legal, tax, and financial implications of any real estate transaction you contemplate.

#### Digital Rights Disclaimer

All rights reserved. No portion of this book/document may be reproduced, distributed, stored in a retrieval system, or transmitted in any form or by any means—electronic, mechanical, photocopy, recording, scanning, or other electronic or mechanical methods—except for brief quotations in critical reviews or articles, without the prior written permission of the publisher. This e-book is licensed and not sold. If you are reading this and did not purchase or receive from BiggerPockets.com or BiggerPockets Employees, this is a stolen copy. Please report it to [publishing@biggerpockets.com](mailto:publishing@biggerpockets.com).

Published by BiggerPockets Publishing, LLC, Denver, CO

Copyright © 2024 by BiggerPockets Publishing.

All Rights Reserved.