

Set Financial Goals

Checklist and Resources

Short-Term Goals

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Medium-Term Goals

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Long-Term Goals

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My Life Stage:

Young Adult • Family • Mature • Retirement

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-
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TODAY'S CONSUMER:



PLAN FOR FINANCES

31%



HAVE AN EMERGENCY FUND

63%



LIVE PAYCHECK TO PAYCHECK

38%



FEEL BEHIND ON FINANCIAL PLANS

41%

CALCULATORS AND RESOURCES

Whether you want to know how long your retirement will last or you want to estimate the amount of retirement income you will need... your answers can be found at regions.com Insights tab.

Go to regions.com/retirement.

This information is general in nature and is not intended to be legal, tax, or financial advice. Although Regions believes this information to be accurate, it cannot ensure that it will remain up to date. Statements or opinions of individuals referenced herein are their own—not Regions'. Consult an appropriate professional concerning your specific situation and irs.gov for current tax rules.

My Retirement Savings Plan

Worksheet to Plan for Your Future

DECISION FACTORS

- | | | |
|--|--|--|
| 1 How much money do you want to accumulate over a certain period of time? | 2 How long can you leave your money invested? | 3 How do you feel about risking your money? |
|--|--|--|





ACTION PLAN

What will I do now to save toward my goals?

What will I do by the end of the month to save money towards my goals?

What will I do by the end of the year to save money towards my goals?

TIPS

-  **1 Don't forget to start saving.**
-  **2 Plan for unexpected events**
Insure yourself and your family.
Any savings plan is one event away from being wiped out without adequate insurance protection.
-  **3 After debt is paid off, put that same amount in savings.**
-  **4 Save your loose change. It adds up!**
- 5 Pay yourself first.**

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