Family Financial Roadmap Worksheet

To help assess your future financial needs, please fill out this worksheet. This simple written overview of age intersections is an easy way for you and your financial advisor to identify upcoming life events. With this overview, you and your financial advisor can work together to construct a comprehensive financial plan that takes your entire family into account.

Questions are designed to help give you insights and items to consider when planning for your future. They are intended for educational purposes only.

Fidelity does not provide legal, tax or estate planning advice. Please consult an appropriately licensed professional for advice on your specific situation.

Primarily sourced from *Advisor for Life* by Stephen D. Gresham, John Wiley & Sons, 2007, with permission to reprint.

US: 640842.3.0 CAN: 62101-v2018820

***!** To properly use this form, install the latest version of Adobe Acrobat Reader.*

PARENTS/ELDERS

Older Loved One #1 Name

FULL NAME

Current Age	+ 5 Years	+ 10 Years	+ 15 Years
XX	5	10	15

Older Loved One #2 Name

FULL NAME

Current Age	+ 5 Years	+ 10 Years	+ 15 Years
XX	5	10	15

Additional Older Loved One(s) Name	Current Age	+10 Years
FULL NAME	XX	10
FULL NAME	XX	10

Additional Older Loved One(s) Name	Current Age	+10 Years
FULL NAME	XX	10
FULL NAME	XX	10

START HERE

YOU

FULL NAME

Current Age	+ 5 Years	+ 10 Years	+ 15 Years
XX	5	10	15

Spouse/Partner Name

FULL NAME

Current Age	+ 5 Years	+ 10 Years	+ 15 Years
XX	5	10	15

CHILDREN/DEPENDENTS

Name(s)	Current Age	+10 Years
FULL NAME	XX	10
FULL NAME	XX	10
FULL NAME	XX	10

Name(s)	Current Age	+10 Years
FULL NAME	XX	10
FULL NAME	XX	10
FULL NAME	XX	10

Notes:

FINANCES	HOUSING	CARE	END OF LIFE
Enter relevant text here	*Enter relevant text here*	*Enter relevant text here*	*Enter relevant text here*