RETIREMENT READINESS REPORT

Companion worksheet for the Verestly Retirement Readiness Calculator. Transfer your calculator results below, then use the report to identify gaps and next actions.

1. YOUR RETIREMENT SNAPSHOT

Current age	_____	**Planned retirement age**	_____
Annual gross income	$_____	**Current retirement savings**	$_____
Monthly contribution	$_____	**Employer match / contribution**	$_____
Current savings rate	_____%	**Readiness score**	_____ / 100

2. GAP & INCOME CHECK

Projected balance	**Target balance**	**Gap / surplus**	**Coverage**
$_____	$_____	$_____	_____%
Projected annual retirement income	**Target annual retirement income**	**Income gap / surplus**	**Coverage**
$_____	$_____	$_____	_____%

3. READINESS SUMMARY

Overall status	_____
Biggest gap	_____
Strongest factor	_____
Most important next step	_____

Use the second page to convert this snapshot into a small number of concrete actions. Re-run the calculator when a major assumption changes.

90-DAY RETIREMENT ACTION PLAN

Choose a few actions that address the largest gap in your readiness report. Keep the plan specific and reviewable.

4. PRIORITY ACTIONS

Priority	Action	Target date	Status
1			
2			
3			

5. 90-DAY CHECKLIST

Done	Action	Target date	Status
[ ]	Confirm the employer match formula and the contribution needed to receive the full match.	_____	_____
[ ]	Review your current retirement contribution percentage.	_____	_____
[ ]	Test at least one higher-contribution scenario in the calculator.	_____	_____
[ ]	Review the planned retirement age assumption.	_____	_____
[ ]	Review the target retirement income.	_____	_____
[ ]	Review whether old retirement accounts need attention.	_____	_____
[ ]	Review beneficiary information where appropriate.	_____	_____
[ ]	Schedule the next retirement-readiness review.	_____	_____

6. END-OF-90-DAY REFLECTION

What changed in your retirement plan?	
What is still unresolved?	
What is the next single action?	

Educational use only. This report summarizes user-entered assumptions and calculator outputs. It is not individualized investment, tax, legal, or financial advice.