

# Set Financial Goals

Checklist and Resources

## NEXT STEP #1: EVALUATE YOUR BENEFITS

Try the [How Do I Estimate Social Security Benefits?](#) calculator.

Bookmark [regions.com/nextstepretirement](https://regions.com/nextstepretirement) for retirement saving and planning resources

## NEXT STEP #2: MEET WITH A PROFESSIONAL AND DEVELOP A PLAN

### Short-Term Goals

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### Medium-Term Goals

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### Long-Term Goals

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### Circle Your Life Stage:

Young Adult • Family • Mature • Retirement

### [An Age by Age Guide to Financial Growth](#)

Ideas for Your Life Stage

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## TODAY'S CONSUMER

According to a Regions Next Step Survey, today's consumers:



## 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.



# 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?

## NEXT STEP #3: EVALUATE YOUR PROCESS TO DETERMINE IF YOU ARE ON TRACK TO RETIRE

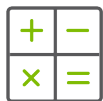
## Action Plan

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?

## Savings Tools



[Calculators](#)

[How Much Should I Save for Retirement?](#)

[How Do I Reach My Savings Goal?](#)

[How Much Will My Savings be Worth?](#)



[Worksheets](#)

[My Financial Goals](#)

[52-Week Savings Challenges](#)

## Learn More with Next Step Courses

[Navigating Medical Expenses](#)

[Preparing for Retirement](#)



# NEXT STEP RESOURCES



## TOOLS AND RESOURCES



### Articles

Articles with tips and advice to help you take the next step toward your financial goals.



### Courses

A self-paced series of interactive videos covering financial wellness tips, accessible via mobile device, tablet, or desktop.



### Worksheets and Templates

Planning worksheets and budget templates to help you break your goals down into manageable steps.



### Podcasts

Quick, educational podcasts with tips to help you achieve your personal and business goals.



### Webinars

Webinars on key financial wellness topics lead by Regions associates.



### Calculators

Interactive calculators that can help you budget and save for all of your goals.



### Learning for Kids

Fun, educational games and activities, focused on math and money, for Grades K-8.

## EXPLORE FOR MORE TIPS



### Family Budgeting & Saving

Financial resources and advice to help families learn smart money habits.

[regions.com/nextstepfamilybudget](https://regions.com/nextstepfamilybudget)



### Navigating Homeownership

Guidance, tools, and advice to prepare for every step as a homeowner.

[regions.com/nextstephomeownership](https://regions.com/nextstephomeownership)



### Financial Literacy for Students

Insights and resources for students to make the most of their college experience.

[regions.com/nextstepforstudents](https://regions.com/nextstepforstudents)



### Retirement Saving & Planning

Tools and resources to help you set saving goals and build your retirement plan.

[regions.com/nextstepretirement](https://regions.com/nextstepretirement)



### Understanding Credit

Learn about credit scores and maintaining good credit to help you on your way to achieving your financial goals.

[regions.com/nextstepcredit](https://regions.com/nextstepcredit)



### Saving for Your Next Vacation

Budgeting hacks and money-saving strategies to help you grow your vacation fund.

[regions.com/nextstepvacationbudget](https://regions.com/nextstepvacationbudget)



### Plan for the Holidays

Budgeting tips for holiday shopping, activities, travel and more.

[regions.com/nextstepholiday](https://regions.com/nextstepholiday)



### Medical Financial Hardship

Resources to help you prepare for and manage medical financial hardship.

[regions.com/nextstepmedicalhardship](https://regions.com/nextstepmedicalhardship)



### Financial Hardship

Learn how to prepare for life's sudden events that impact your finances.

[regions.com/nextstepfinancialhardship](https://regions.com/nextstepfinancialhardship)



### Next Step for Business

Collection of resources for business owners to help to take their businesses to the next level.

[regions.com/nextstepforbusiness](https://regions.com/nextstepforbusiness)

## LEARN MORE

- 1 Make an appointment with a Regions banker:**
  - Call the Regions Green Line at 1-800-REGIONS
  - Go to [Regions.com](https://Regions.com) and click "Make an Appointment"
  - Visit any Regions branch
- 2 Visit the [Next Step Courses](#) for quick, easy-to-understand money tips, including how to [Navigate Medical Expenses](#).**
- 3 Use our online resources including articles, podcasts, and calculators: [regions.com/nextstep](https://regions.com/nextstep)**



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