These values are supplied by you.

__________  Age on birthday this year

__________  Age at retirement

__________  Years of retirement ( _______ months )

$__________  Monthly pension during retirement

These values are calculated. Attach work if you want partial credit.

$__________  Amount needed to retire

__________  Years until retirement ( _______ months )

$__________  Monthly savings required to meet retirement goal

Ten years later ...

$__________  Balance in retirement fund after 10 years

$__________  Balance after receiving inheritance

$__________  Amount money will grow to before retirement

Answer one of the following two lines depending on whether the total on the previous line is less or more than what you need to retire.

$__________  New monthly payment required until retirement

$ ___________  New monthly pension during retirement
The address of the house is ____________________________________

The cost of the house is $______________

The 20% down payment is $______________

The amount financed is $______________

The monthly payment is $______________

The total amount repaid is $______________

The interest paid is $______________

**Ten years have passed**

The balance still owed is $______________

The house is now worth $______________

The equity in the house is $______________

**Assume that you pay an extra $250 per month from the start of the loan**

The monthly payment is now $______________

The house will take ____________ months (______________ years) to pay off

The total amount repaid is $______________

The interest paid is $______________