**Vision at 35 years of age**

**Adapted from Career Association With Resources for Education Inc. (C.A.R.E.)**

*Used with permission.*

Name: *Sam Student* Today’s Date: *September 30, 2019 Current Age: 17*

**At 35, do you .** . .

1. Own a house? *\_\_\_\_\_\_\_\_\_\_*
2. Eat well? \_\_\_\_\_\_\_\_\_\_\_ Dine Out? \_\_\_\_\_\_\_\_
3. Are you married? ­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_
4. Have children? \_\_\_\_\_\_\_\_\_\_\_ If so how many? *\_\_\_\_\_\_\_*
5. Own a car: \_\_\_\_\_\_\_\_\_\_\_ How many? \_\_\_\_\_\_\_
6. Own a SUV? \_\_\_\_\_\_\_\_\_\_\_
7. Own a RV? \_\_\_\_\_\_\_\_\_\_\_
8. Own a boat? \_\_\_\_\_\_\_\_\_\_\_ If so, what kind? \_\_\_\_\_\_
9. Do you take regular vacations?\_\_\_\_\_\_
10. Save for your children’s education?\_\_\_\_\_\_
11. Have “toys” (big screen TVs, stereo, cell phones, computers?\_\_\_\_\_
12. Like nice clothes? \_\_\_\_\_\_\_\_\_\_
13. Save for retirement? \_\_\_\_\_\_\_\_\_\_\_
14. Own your own business?­­\_\_\_\_\_\_\_\_\_\_

*Continued*

1. Are you a supervisor at work?\_\_\_­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. What kind of work do you do?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. What is your spouse’s vocation?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Is your spouse motivated?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Are you ready for a financial emergency/Misc?\_\_\_\_\_\_\_
6. Do you usually want more than you have?\_\_\_\_\_\_\_







## Scoring “Vision at 35” Questionnaire

## in today’s dollars

***(Score Sheet)***

Per Month needed after taxes:

1. \_\_\_\_ ($5.50 per month per $1000 in value (250K = per

month) adjusted for 20% down (4.5% @30 years)

-Property Taxes $300 per month

-Utilities $150 per month

-Insurance $125 per month

1. \_\_\_\_($250 per month per adult, $350 if eating out)

1. \_\_\_\_($400 per month-Health and Life Insurance)
2. \_\_\_\_($1200 per month per child-Includes daycare)

1. \_\_\_\_ ($450 per car-includes license and insurance)
2. \_\_\_\_ ($550 per SUV-includes license and insurance)
3. \_\_\_\_ ($450 per RV-includes license and insurance)
4. \_\_\_\_ ($300 per boat-includes license and insurance)
5. \_\_\_\_ ($300 per month for 2 vacations a year)
6. \_\_\_\_ ($200 per child)
7. \_\_\_\_ ($200 per month –computer, cell phones, TV, etc.)
8. \_\_\_\_ ($150 per month - clothing allowance)
9. \_\_\_\_ ($500 per month – depending on goals)

***(Score Sheet)***

1. N/A Shows need for education and traditional values
2. N/A Shows need for education and traditional values

16. N/A Shows need for education and traditional values

17. N/A Shows need for education and traditional values

18. N/A Shows need for education and traditional values

19. 200 ($200 per month)

20. N/A Shows need for education to secure good paying job

$ \_\_\_\_\_\_ TOTAL monthly needed income (after taxes)

$\_\_\_\_\_\_ Annual income needed (after taxes)

$\_\_\_\_\_\_ Divided by .75 equals approximated gross

income needed before state and federal tax

**Revised 1-15-19**