

Table 3: Case Study Goals Revealed

Category	Original Goal	New Goal
Retirement	Retire at age 55 with 100% of your income	Semi-retirement in a new career as a brewer at a local brewery that is lower paying at age 55
College	Pay for 100% of the average cost of in-state public tuition	Be prepared to pay for a minimum of 1/3 of the average cost of in-state public tuition
Housing	\$1 million home closer to downtown and move-in ready	\$750,000 fixer-upper that is close to downtown