

How do I get started with the Lifetime Planner?

The best place to start your plan is to set up your retirement goals. Quicken uses the plan assumptions you add for setting up a retirement goal for college planning, home purchase planning, and special purchase planning, so you don't have to enter the same information twice.

If you already have existing accounts and loan information in Quicken, this information is also pre-filled in the plan assumptions for each life event goal.

1. Click the **Planning** tab.
2. Click the **Lifetime Planner** button.
3. Click **Options** and then choose **Review** or change plan assumptions.
4. As you set up your retirement plan, you may need more information. Check the highlighted title on the left side of the window, then click the matching topic below to learn more.
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More information

- [Assumptions in the Lifetime Planner calculations](#)



Not Available in Canada

This tool is unavailable for users of our Canadian products.