

RETIREMENT BUDGET

RETIREMENT INCOME SOURCES

| | Monthly | Annually |
|---------------------------|---------|----------|
| Social Security income | | |
| FERS/CSRS Pension | | |
| Part Time Employment | | |
| Rental income | | |
| Shares/Investments income | | |
| Annuity Income | | |
| Other retirement plans | | |
| TOTAL | | |

NET INCOME SUMMARY

Annual Lifestyle Expenses
Est'd Annual Retirement Income
Annual Retirement Income Gap

AGE

Age Today
Age At Retirement
Years Until Retirement

HOUSING COSTS

| | Monthly | Annually |
|------------------------|---------|----------|
| Mortgage/Rent/HOA Fees | | |
| Real Estate Taxes | | |
| Maintenance/Repair | | |
| Energy/Utilities | | |
| Cable/Internet | | |
| Cell Phone | | |
| Home Insurance | | |
| Home Improvement | | |
| Other | | |
| TOTAL | | |

PERSONAL EXPENSES

| | Monthly | Annually |
|----------------------|---------|----------|
| Fitness/Care | | |
| Clothing | | |
| Gifts/Holidays | | |
| Dining Out | | |
| Vacation | | |
| Education | | |
| Charitable Donations | | |
| Memberships | | |
| Other | | |
| TOTAL | | |

TRANSPORTATION EXPENSES

| | Monthly | Annually |
|----------------------|---------|----------|
| Loan/Lease Payments | | |
| Auto Insurance | | |
| Maintenance/Fuel | | |
| Taxes/Registration | | |
| Discretionary Travel | | |
| Other | | |
| TOTAL | | |

INSURANCE EXPENSES

| | Monthly | Annually |
|----------------------------|---------|----------|
| FEHB/Health Insurance | | |
| Medicare/Supplemental Ins. | | |
| Prescription Drugs | | |
| Dental/Vision | | |
| FEGLI/Life Insurance | | |
| FLTCIP/LTC Insurance | | |
| Other | | |
| TOTAL | | |

DAILY LIVING EXPENSE

| | Monthly | Annually |
|--------------|---------|----------|
| Groceries | | |
| Child Care | | |
| Parent Care | | |
| Other | | |
| TOTAL | | |

EXPENSE SUMMARY

| | Monthly | Annually |
|---------------------------|---------|----------|
| Housing Costs | | |
| Personal Expenses | | |
| Transportation Expenses | | |
| Daily Living Expenses | | |
| Insurance/Health Expenses | | |
| TOTAL | | |

Clear Form