



Retirement Expense Worksheet Monthly Expenses

<u>Expense Category</u>	<u>Monthly Amount</u>
Housing	\$ _____
Mortgage	\$ _____
Property Taxes	\$ _____
Homeowner Insurance	\$ _____
Rent	\$ _____
Utilities	\$ _____
Maintenance/Fees	\$ _____
Groceries	\$ _____
Dining Out	\$ _____
Transportation	\$ _____
Vehicle maintenance	\$ _____
Car Loan Payment	\$ _____
Fuel	\$ _____
Auto insurance	\$ _____
Health Care	\$ _____
Medical Services	\$ _____
Medications & Supplies	\$ _____
Health Insurance	\$ _____
Life Insurance	\$ _____
Disability Insurance	\$ _____
Long-Term Care Insurance	\$ _____
Personal Care	\$ _____
Clothing	\$ _____
Products & Services	\$ _____
Family Care	\$ _____
Alimony	\$ _____
Child Care	\$ _____
Loans/Credit Cards	\$ _____
Entertainment	\$ _____
Travel/Vacation	\$ _____
Hobbies	\$ _____
Gifts	\$ _____
Education	\$ _____
Charitable Contributions	\$ _____
Miscellaneous	\$ _____
Total Monthly Expenses	\$ _____



RETIREMENT INCOME WORKSHEET

	You	Your Spouse
Current Age	_____	_____
Desired Retirement Age	_____	_____
Current Income	\$ _____	\$ _____

Desired Income in Retirement

Dollar Amount or	\$ _____	\$ _____
% of pre-retirement income	_____ %	_____ %

Monthly Income

	You	Your Spouse
Social Security	\$ _____	\$ _____
Pension	\$ _____	\$ _____
Employment Income	\$ _____	\$ _____
Rental Income	\$ _____	\$ _____
Veteran's Benefits	\$ _____	\$ _____
Other	\$ _____	\$ _____
 Total Monthly Income	 \$ _____	 \$ _____

Total Combined Monthly Income: \$ _____

Federal Income Tax Rate	_____ %
State Income Tax Rate	_____ %

Total After Tax Monthly Income: \$ _____