

RETIREMENT INCOME WORKSHEET

	Estimated Current Expenses	Retirement Expenses (Today's \$)	Increasing Expense?	
Contributions	\$	\$	Yes	No
<i>Home:</i>				
Mortgage	\$	\$	Yes	No
Insurance	\$	\$	Yes	No
Real Estate taxes	\$	\$	Yes	No
Maintenance/repairs	\$	\$	Yes	No
<i>Utilities:</i>				
Electricity/gas/water	\$	\$	Yes	No
Phone (including toll charges)	\$	\$	Yes	No
Cable TV	\$	\$	Yes	No
Security System	\$	\$	Yes	No
<i>Insurance:</i>				
Medical	\$	\$	Yes	No
Personal care	\$	\$	Yes	No
<i>Children:</i>				
Clothing	\$	\$	Yes	No
School tuition/expenses	\$	\$	Yes	No
Gifts	\$	\$	Yes	No
Other	\$	\$	Yes	No
<i>Debt Payments:</i>				
Autos	\$	\$	Yes	No
Personal Loans	\$	\$	Yes	No
Other	\$	\$	Yes	No
Income taxes	\$	\$	Yes	No
Total	\$	\$		