



Income
A Worksheet

How much income
will you need in retirement?

Find out with this handy worksheet

A successful retirement strategy takes determination, in more ways than one.

If you don't know what your income needs are in retirement, you won't be able to manage them successfully.

Get started

Consider what you spend today. You have things you need, like housing and utilities, and things you choose to spend money on, such as vacations and entertainment. Retirement will be the same. Let's call them your **essential expenses** and your **lifestyle expenses**.

- ✓ Evaluate your current expenses
- ✓ Enter those expenditure costs for each category on this worksheet

Seeing your expenses in writing can help you determine how much income you'll need each year in retirement.

Take the next step

Work with a financial professional to create a retirement income plan that addresses your goals in a manageable and realistic way.



Clothing and Personal Care

\$ _____



Medical Care and Insurance

\$ _____



Property Insurance

\$ _____



SOURCES

Savings and Investments:

Employer plans
i.e. 401(k), 403(b)

IRAs

Stocks

Mutual Funds

CDs

Savings/Money Market

Bonds

Real Estate/Rental



Other Insurance
(life, long-term care)

\$ _____

Essential Expenses

Lifestyle Expenses



Travel

\$ _____



Charitable Giving

\$ _____



Recreation

\$ _____



Out

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