

Retirement Budget Worksheet

| Retirement Income Sources | Monthly | Annual |
|-----------------------------|---------|--------|
| Social Security | \$ | \$ |
| Work Earnings | \$ | \$ |
| Company Pension | \$ | \$ |
| 401(k) Plan | \$ | \$ |
| Retirement Accounts | \$ | \$ |
| Taxable Investment Accounts | \$ | \$ |
| Annuity | \$ | \$ |
| Rental Income | \$ | \$ |
| Business Interests | \$ | \$ |
| Other | \$ | \$ |
| | | |
| Taxes | Monthly | Annual |
| Income Tax | \$ | \$ |
| Property Tax | \$ | \$ |
| Capital Gains Tax | \$ | \$ |
| Business/Corporate Taxes | \$ | \$ |
| Other | \$ | \$ |
| | | |
| Household Expenses | Monthly | Annual |
| Rent | \$ | \$ |
| HOA Fees | \$ | \$ |
| Homeowners/Rental Insurance | \$ | \$ |
| Home Maintenance/Repairs | \$ | \$ |
| Home Improvements | \$ | \$ |
| Security System | \$ | \$ |
| Home appliances | \$ | \$ |
| Furniture | \$ | \$ |
| Other | \$ | \$ |
| | | |
| Utilities | Monthly | Annual |
| Electricity | \$ | \$ |
| Water | \$ | \$ |
| Gas | \$ | \$ |
| Cable/Satellite TV | \$ | \$ |
| Internet | \$ | \$ |
| Phone/Data Plan | \$ | \$ |
| Other | \$ | \$ |

| Food | Monthly | Annual |
|--|----------------|---------------|
| Groceries | \$ | \$ |
| Beverages | \$ | \$ |
| Entertaining (Parties, Special Events) | \$ | \$ |
| Restaurants | \$ | \$ |

| Health Care | Monthly | Annual |
|--|----------------|---------------|
| Medicare/Supplemental Insurance Premiums | \$ | \$ |
| Deductible | \$ | \$ |
| Co-Payments | \$ | \$ |
| Co-Insurance | \$ | \$ |
| Eye Doctor/Glasses | \$ | \$ |
| Dental | \$ | \$ |
| Prescriptions/Over-the-Counter Medications | \$ | \$ |
| Vitamins | \$ | \$ |
| Fitness (yoga, personal trainer, YMCA, etc.) | \$ | \$ |
| Life Insurance | \$ | \$ |
| Long-Term Care | \$ | \$ |
| Other | \$ | \$ |

| Transportation | Monthly | Annual |
|-----------------------|----------------|---------------|
| Car Lease Payments | \$ | \$ |
| Auto Insurance | \$ | \$ |
| Registration | \$ | \$ |
| Gas | \$ | \$ |
| Maintenance | \$ | \$ |
| Repairs | \$ | \$ |
| Upgrades | \$ | \$ |
| Other | \$ | \$ |

| Personal Care | Monthly | Annual |
|----------------------|----------------|---------------|
| Clothing | \$ | \$ |
| Tailor | \$ | \$ |
| Dry Cleaning | \$ | \$ |
| Toiletries | \$ | \$ |
| Feminine Products | \$ | \$ |
| Cosmetics | \$ | \$ |
| Hair | \$ | \$ |
| Nails | \$ | \$ |
| Facials | \$ | \$ |
| Shoeshine | \$ | \$ |

| | | |
|---------|----|----|
| Massage | \$ | \$ |
| Other | \$ | \$ |

| Child Care | Monthly | Annual |
|-------------------------|----------------|---------------|
| Child Support Payments | \$ | \$ |
| Day Care/Babysitting | \$ | \$ |
| Education | \$ | \$ |
| Sports | \$ | \$ |
| Recreational Activities | \$ | \$ |
| Summer Camp | \$ | \$ |
| Other | \$ | \$ |

| Pet Care | Monthly | Annual |
|-----------------|----------------|---------------|
| Food | \$ | \$ |
| Grooming | \$ | \$ |
| Boarding | \$ | \$ |
| Veterinarian | \$ | \$ |
| Medication | \$ | \$ |
| Pet Insurance | \$ | \$ |
| Clothing | \$ | \$ |
| Other | \$ | \$ |

| Professional Services | Monthly | Annual |
|------------------------------|----------------|---------------|
| Accountant | \$ | \$ |
| Financial Planner | \$ | \$ |
| Lawyer | \$ | \$ |
| Business Consultant | \$ | \$ |
| Other | \$ | \$ |

| Debt Payments | Monthly | Annual |
|----------------------|----------------|---------------|
| Mortgage | \$ | \$ |
| Student Loans | \$ | \$ |
| Car Loans | \$ | \$ |
| Credit Cards | \$ | \$ |
| Business Loans | \$ | \$ |
| Bank Loans | \$ | \$ |
| Other | \$ | \$ |

| Education/Self Improvement | Monthly | Annual |
|-----------------------------------|----------------|---------------|
| College | \$ | \$ |
| Classes | \$ | \$ |
| Books | \$ | \$ |
| Subscriptions | \$ | \$ |
| Supplies | \$ | \$ |

| | | |
|---------------------------------|----------------|---------------|
| Other | \$ | \$ |
| Entertainment/Recreation | Monthly | Annual |
| Sports | \$ | \$ |
| Theater | \$ | \$ |
| Camping | \$ | \$ |
| Movies | \$ | \$ |
| Music | \$ | \$ |
| Museums | \$ | \$ |
| Other Hobbies | \$ | \$ |
| Club Membership Fees | \$ | \$ |
| Digital Devices | \$ | \$ |
| Other | \$ | \$ |
| Vacations/Travel | Monthly | Annual |
| Travel Tickets | \$ | \$ |
| Hotels/Lodging | \$ | \$ |
| Food | \$ | \$ |
| Auto | \$ | \$ |
| Entertainment | \$ | \$ |
| Souvenirs | \$ | \$ |
| Other | \$ | \$ |
| Miscellaneous | Monthly | Annual |
| Charitable Cash Donations | \$ | \$ |
| Gifts | \$ | \$ |
| Alimony | \$ | \$ |
| Other | \$ | \$ |
| Total: | \$ | \$ |

Workshop Sign-In Sheet

[Advisor Name]
"Life After Work" Retirement Income Workshop
[Date of Presentation]

Welcome and Thank You for Joining Us!

Please print your name, email, and phone number. Please sign in all guests.

| Name | Email Address | Phone Number |
|------|---------------|--------------|
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[Advisor Name], [Advisor Contact Information], [Advisor Disclosures]