

Retirement Budget Worksheet

PLANNING
WORKSHEETS

	Before Retirement	During Retirement
INCOME (MONTHLY)		
Your gross income		
Spouse's gross income		
Your Social Security		
Spouse's Social Security		
Your pension income		
Spouse's pension income		
Income from investments and savings		
Total monthly income =		
EXPENSES (MONTHLY)		
Charitable contributions		
Federal income tax		
State and local income taxes		
Social Security and Medicare taxes		
Retirement plan contributions		
Housing (mortgage payment, rent, property taxes, home insurance)		
Utilities, telephone, Internet		