Your Retirement Income Worksheet



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Not All Retirement Expenses Are Created Equally

As you prepare for retirement, it is important to understand there are generally two kinds of retirement expenses.

Essential:	
Discretionary:	

Gap Finder

How to identify your retirement income needs in 4 easy steps:

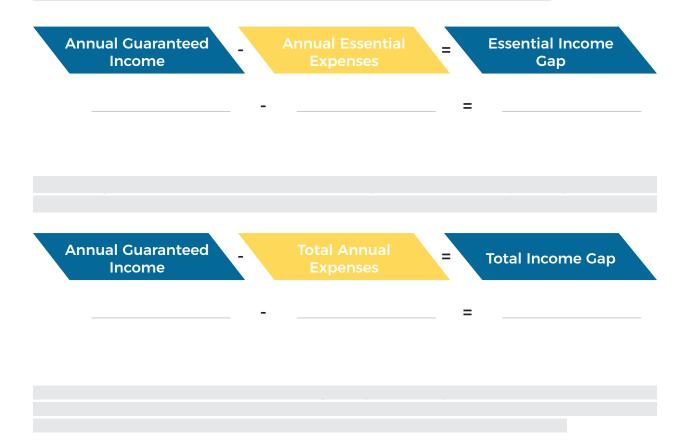
1. ESTIMATE your expenses in retirement. Expenses measured annually

Essential Expenses	Lifestyle Expenses
	Annual Lifestyle Expenses
	Annual Essential Expenses
	Annual Lifestyle Expenses
Annual Essential Expenses	Total Annual Expenses (Essential + Lifestyle)
Planning Tip:	

2. DETERMINE your guaranteed sources of income.

Guaranteed Sources of Retirement Income Total Annual Guaranteed Income

3. CALCULATE your essential income gap.



4. INVENTORY your investment portfolio.	

Inventory of Personal Assets Total Current Assets

