

Retirement Budgeting Worksheet

Age today: _____ Goal retirement age: _____ Years until retirement: _____ Anticipated years in retirement: _____

Income Sources

	Weekly earnings:	Monthly earnings:	Annual earnings:
Social Security:			
Annuity income:			
Company pensions:			
Other misc. plans:			

Food

	Weekly cost:	Monthly cost:	Annual cost:
Groceries:			
Beverages:			
Dining out:			

Transportation

	Weekly cost:	Monthly cost:	Annual cost:
Car payments:			
Auto insurance:			
Vehicle maintenance:			
Misc. transportation:			

Health Care

	Weekly cost:	Monthly cost:	Annual cost:
Medicare/insurance:			
Prescription drugs:			
Dental:			
Eye doctor:			
Other expenses:			

Housing Costs

	Weekly cost:	Monthly cost:	Annual cost:
Mortgage/rent:			
Utilities/internet:			
Maintenance:			
Household supplies:			
Credit card payments:			

Personal Care

	Weekly cost:	Monthly cost:	Annual cost:
Clothing:			
Other products:			

Miscellaneous

	Weekly cost:	Monthly cost:	Annual cost:

Summary

	Annual totals:
Income needed:	
Social Security and other income:	
Annual savings goal: (Income needed – Social Security and other income)	
Total savings goal: (Annual savings goal × Anticipated years in retirement)	