

Your Pre-Retirement Income Worksheet

Once you know how much your retirement might cost, you can see better how to pay for it. First, let's take a look at your current expenses and savings based just on your current income.

Income	% of Total
Non-Investment Income	
Salary	\$ %
Pension	\$ %
Social Security	\$ %
Business and Real Estate	\$ %
Other	\$ %
TOTAL INCOME	\$
Expenses	% of Total
Non-Discretionary Spending	
Basic Living	\$ %
Mortgage	\$ %
Credit Card Debt	\$ %
Taxes	\$ %
Insurance	\$ %
Health Care	\$ %
Non-Discretionary Subtotal	\$ %
Discretionary Spending	
Travel	\$ %
Hobbies	\$ %
Luxuries	\$ %
Gift to Family/Charities	\$ %
Other	\$ %
Discretionary Subtotal	\$ %
TOTAL EXPENSES (add both Subtotals)	\$

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