

Retirement Budget Worksheet for _____.

Personal Information	Current	At Retirement
Age		
Housing Costs	Current	At Retirement
Mortgage or rent		
Real estate taxes		
Utilities		
Maintenance and repair		
Home insurance		
Other		
Total		
Personal Expenses	Current	At Retirement
Clothing		
Grooming		
Groceries		
Medical insurance		
Prescription drugs		
Taxes		
Debt		
Other		
Total		
Transportation Costs	Current	At Retirement
Car payment or lease		
Car Insurance		
Gas and maintenance		
Public transportation		
Other		
Total		
Travel		
Entertainment		
Charitable giving		
Other		
Other		
Total		