

Retirement Planning Worksheet

Personal Information

Full Name

Current Age

Planned Retirement Age

Estimated Retirement Expenses

Expense Item	Estimated Monthly Amount
Housing	<input type="text"/>
Utilities	<input type="text"/>
Food	<input type="text"/>
Healthcare	<input type="text"/>
Insurance	<input type="text"/>
Transportation	<input type="text"/>
Leisure/Travel	<input type="text"/>
Other	<input type="text"/>

Estimated Retirement Income Sources

Income Source	Estimated Monthly Amount
Social Security	<input type="text"/>
Pension	<input type="text"/>

401(k)/IRA Withdrawals	<input type="text"/>
Investment Income	<input type="text"/>
Part-time Work	<input type="text"/>
Other	<input type="text"/>

Assets and Savings

Account/Asset	Current Balance
401(k) / 403(b)	<input type="text"/>
IRA/Roth IRA	<input type="text"/>
Savings	<input type="text"/>
Investments	<input type="text"/>
Home Equity	<input type="text"/>
Other	<input type="text"/>

Notes & Considerations