

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	
Investment Income	
Part-time Work	
Other	

Assets and Savings

Account/Asset	Current Balance
401(k) / 403(b)	
IRA/Roth IRA	
Savings	
Investments	
Home Equity	
Other	

Notes & Considerations