



# RETIREMENT INCOME/EXPENSES SELF-ASSESSMENT

EXPENSES	Specific Item	Current Expenses	Retirement Expenses
<b>Housing:</b>	Mortgage Payment / Rent		
	Utilities		
	Home Maintenance		
	Property Insurance		
	Property Taxes		
	Association Fees		
	Home Furnishings		
<b>Food and Household:</b>	Seasonal Expenses (snow, pool?)		
	Groceries		
<b>Clothing and Personal Care:</b>	Household Supplies		
	Clothing Purchases		
<b>Transportation:</b>	Dry Cleaning / Laundry		
	Salon/ Personal Care		
	Car Payments		
	Car Insurance		
<b>Other Insurance:</b>	Fuel/Repairs/Parking		
	Public Transportation		
	Life		
<b>Medical Expenses:</b>	Liability (Umbrella)		
	Long-Term Care		
	Health Insurance		
	Medicare		
<b>Entertainment/Recreation:</b>	Deductibles / Unreimbursed		
	Prescriptions / Vitamins		
	Vacation and Travel		
	Holidays		
	Meals Out and Entertainment		
<b>Charitable Contributions:</b>	Clubs and Recreation		
	Church, Other Donations		
<b>Debt Repayment (other than Housing and Auto):</b>	Credit Cards / Bills		
	Installment Notes		
	Rental / Investment Property		
	Other Debt		
<b>Miscellaneous Expenses:</b>	Education		
	Gifts		
	Elder and Respite Care		
	Pet Care (food, vet, board)		
	Domestic Help		
	Alimony / Child Support		
	Professional Dues		
	Subscriptions		
	Other		
	<b>Totals:</b>		
<b>Projected Retirement Expenses for Household:</b>			

INCOME		Current Income	Retirement Income
<b>Earned Income:</b>	Husband		
	Wife		
<b>Retirement Plan / IRA Distributions:</b>	Husband		
	Wife		
<b>Social Security Benefits:</b>	Husband		
	Wife		
<b>Interest Income:</b>			
<b>Dividend Income:</b>			
<b>Royalty Income:</b>	Husband		
	Wife		
<b>Consultation Income:</b>	Husband		
	Wife		
<b>Other Distributions:</b>			
<b>Cash Receipts:</b>	Sale of Assets		
	Alimony/Child Support		
	Trust Distributions		
	Other		
<b>Totals:</b>			
<b>Projected Retirement Income for Household:</b>			

<b>Summary</b>	
<b>Projected Retirement Income:</b>	
<b>Projected Retirement Expenses:</b>	< >
<b>Difference:</b>	