



Planning Retirement Income

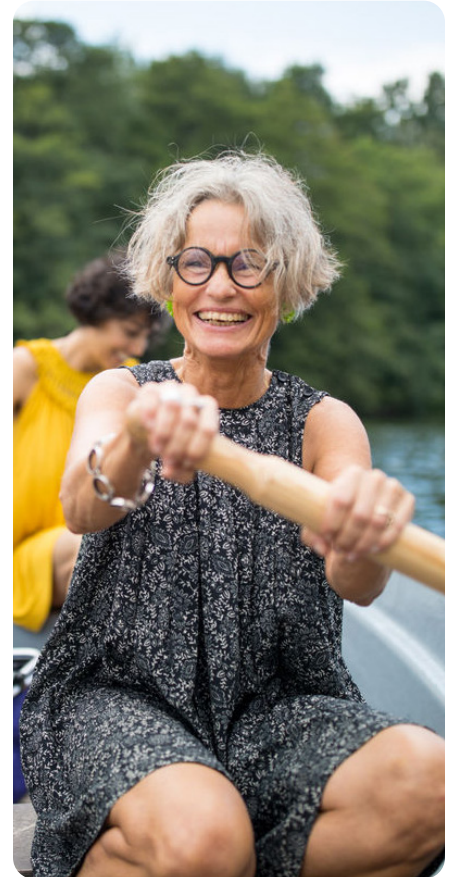
Your path to building a reliable income stream.

Prepared for _____, age _____
 and _____, age _____
 on _____

Current Financial Snapshot:

Everything You Have Today

Savings Account	\$ _____
Checking Account	\$ _____
Life Insurance	\$ _____
Certificates Of Deposit (CDs)	\$ _____
Money Market Accounts	\$ _____
Deferred Annuities	\$ _____
Individual Retirement Accounts	\$ _____
Mutual Funds	\$ _____
Stocks	\$ _____
Bonds	\$ _____
Real Estate	\$ _____
Retirement Savings	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Assets	\$ _____



Monthly Expenses

Housing	\$ _____
Property Taxes	\$ _____
Food	\$ _____
Utilities	\$ _____
Clothing	\$ _____
Medical Expenses	\$ _____
Home Insurance	\$ _____
Auto Insurance	\$ _____
Life Insurance	\$ _____
Medical Insurance	\$ _____
Auto Care/Fuel	\$ _____
Travel	\$ _____
Entertainment	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Expenses	\$ _____

Monthly Income

Wages/Salary	\$ _____
Investment Income	\$ _____
Alimony/Other Support	\$ _____
_____	\$ _____
_____	\$ _____
Today's Income	\$ _____
A Typical Month in Retirement	
Retirement Plan	\$ _____
Pension Plan	\$ _____
Social Security	\$ _____
Investment Income	\$ _____
Income Annuity	\$ _____
_____	\$ _____
_____	\$ _____
Tomorrow's Income	\$ _____

The Bottom Line

$$\begin{array}{rcc}
 \$ \underline{\hspace{2cm}} & - & \underline{\hspace{2cm}} = \$ \underline{\hspace{2cm}} \\
 \text{Tomorrow's Income} & & \text{Total Expenses} & & \text{Monthly Surplus/Shortfall}
 \end{array}$$

**This worksheet is only an estimate.
Please consult your financial planner to determine the right amount for your retirement needs.**

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