Retirement Planner Worksheet

Personal Information

Clients	Name	Birth Date	Current Age	Gross Annual Salary	Take-Home Pay
You					
Your Spouse					

Account Balances

Account Type	You: Company	You: $ Amount	Spouse: Company	Spouse: $ Amount
Traditional IRA				
Roth IRA				
Investment				
Other				
Checking				
Savings				
403(b)				
401(k)				
401(a)				
457				

Contributions per Pay Period

Account	You: Employee Contributions	You: Employer Contributions	Spouse: Employee Contributions	Spouse: Employer Contributions
403(b)				
401(a)				
Other				
Other				

Social Security Projections

Social Security	You: If Taken at Age	You: Projected $ Amount	Spouse: If Taken at Age	Spouse: Projected $ Amount
Scenerio 1				
Scenerio 2				
Scenerio 3				

Retirement Income

Income Sources	You	Your Spouse
Pension Type		
Pension Income		
Age Pension Takes Place		
Part Time Work In Retirement		
Other Sources of Monthly Income		
Other Defined Benefits		

Expenses

Essential Expenses	Monthly $ Amount
Mortgage/Rent	
Food	
Utilities	
Medical	
Vehicle/Transportation	
Clothing	
Other	
Total	

Discetionary Expenses	Monthly $ Amount
Travel	
Entertainment	
Hobbies	
Other	
Total	

Notes

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