

Retirement Worksheet



Monthly **After Tax** Income

Income # 1 \$ _____

Income # 2 \$ _____

Total Income \$ _____



Lifestyle Choice:
70% 85% 100%
\$ _____



Retirement Shortfall
\$ _____
X 12 = \$ _____



Other Future Monthly Income:

\$ _____ Pension

\$ _____ Social Sec.

Years To Retirement



Funding the shortfall:
Bank rate _____ %
Need to save \$ _____



Retirement Income Required
[@ 3% inflation] \$ _____



Starting Assets

\$ _____

\$ _____

\$ _____ Total



Monthly Savings

\$ _____

\$ _____



Return %

Con.	5%
Mod.	8%
Gro.	10%
Agg.	15%

Summary

Investing \$ _____ (a) per month at _____ % (b) return over _____ years (c) will accumulate the \$ _____ (d) you need to have in the bank at _____ % (e), which will give you the \$ _____ (f) needed to live at _____ % (g) of your net income today!!