

Expenses - Part 1	Pre-Retirement	Retirement	Difference
Housing			
Mortgage/Rent			0
Home Equity Loan			0
Association Dues			0
Utilities (gas, electric, water)			0
Additional Utilities (cable/dish, Internet, etc.)			0
Telephone (landline, cellular)			0
Property Taxes			0
Property Insurance			0
Maintenance			0
Other			0
Housing Total	0	0	0
Transportation			
Vehicle 1 Loan/Lease Payment			0
Vehicle 2 Loan/Lease Payment			0
Vehicle 1 Insurance			0
Vehicle 2 Insurance			0
Fuel			0
Maintenance & Repairs			0
Other			0
Transportation Total	0	0	0
Basic Necessities & Personal			
Groceries			0
Dining Out			0
Clothing			0
Hair & Beauty			0
Subscriptions			0
Personal Allowance			0
Life Insurance			0
Other 1			0
Other 2			0
Other 3			0
Basic Necessities & Personal Total	0	0	0
Sub-Total Part 1	0	0	0

Expenses - Part 2	Pre-Retirement	Retirement	Difference
Healthcare			
Group or Individual Insurance Premiums			0
Medicare Insurance			0
Medigap Insurance			0
Long-Term Care Insurance			0
Dental Insurance			0
Vision Insurance			0
Deductables & Co-payments			0
Prescription Drugs			0
Other			0
Healthcare Total	0	0	0
Travel & Leisure			
Travel/Vacations			0
Entertainment			0
Meals while traveling			0
Other Loans (boat, RV, etc.)			0
Other Travel & Leisure			0
Total Travel & Leisure	0	0	0
Other Expenses			
Gifts			0
Alimony/Child Support			0
Dependent Care			0
Charitable Contributions			0
Credit Card Payments			0
Other Debts 1			0
Other Debts 2			0
Other Debts 3			0
College Expense (savings/current costs)			0
Family Care			0
Pet Care			0
Clothing			0
Savings			0
Other 1			0
Other 2			0
Total Other Expenses	0	0	0
Sub-Total Part 2	0	0	0
Sub-Total Part 1	0	\$	\$
TOTAL EXPENSES	\$	0	0

Income - Part 3	Pre-Retirement	Retirement	Difference
You			
Private or Government Pensions	_____	_____	0
Employer Retirement Plan(s)	_____	_____	0
Social Security	_____	_____	0
Military Pension	_____	_____	0
Wages	_____	_____	0
Your Total Income	0	0	0
Your Spouse			
Private or Government Pensions	_____	_____	0
Employer Retirement Plan(s)	_____	_____	0
Social Security	_____	_____	0
Military Pension	_____	_____	0
Wages	_____	_____	0
Your Spouse's Total Income	0	0	0
Other Income			
Rental Property	_____	_____	0
Reverse Mortgage	_____	_____	0
Interest/Dividend Income	_____	_____	0
Other Income 1	_____	_____	0
Other Income 2	_____	_____	0
Total Other Income	0	0	0
TOTAL INCOME	0	0	0
TOTAL EXPENSES		0	0
DIFFERENCE	0	0	0