

## Retirement Budget

### Income & Expenses

Monthly Income	Amount
Retirement Account Income	
Social Security	
Pension	
Annuity	

Monthly Expenses	Amount
<b>Residence</b>	
Mortgage or Rent	
Upkeep (Cleaning, Landscaping, etc.)	
Maintenance & Repair	
Property Taxes	
Insurance	
Associations & Dues	
<b>Utilities</b>	
Gas	
Electric	
Water	
Trash	
Cell Phone(s)	
Home Phone	
Internet	
TV	
<b>General Living</b>	
<b>Grocery</b>	
Food	
Supplies	
Health & Beauty	
Vitamins & Supplements	
Clothing	
Coffee Shop	
Restaurants	
<b>Entertainment</b>	
Books	
Movies	
Subscriptions	
<b>Fitness</b>	
Fees (Gyms, Studios, etc.)	
Equipment	
Clothing	
<b>Vacation &amp; Travel</b>	
Transportation	
Food & Accommodations	

Savings	Balance
Retirement Account(s)	
Savings Accounts	
Brokerage and other	

Monthly Expenses	Amount
<b>Healthcare</b>	
<b>Medical</b>	
Premium	
Deductible	
Co-Pay	
Prescriptions	
Out-of-pocket	
<b>Dental</b>	
Premium	
Deductible	
Co-Pay	
Out-of-pocket	
<b>Vision &amp; Eye Care</b>	
Premium	
Deductible	
Co-Pay	
Out-of-pocket	
<b>Vehicles &amp; Transportation</b>	
Car/Truck payments	
Gas	
Insurance	
License & Reg	
Maintenance & Repair	
<b>Pets</b>	
Food & Supplements	
Preventatives	
Vet	
Medications	
Other	
<b>Other</b>	
<b>Charitable Contributions</b>	
Religious	
Causes	
<b>Gifts &amp; Presents</b>	
Family	
Friends	