

Income Fact Finder

Check Your Retirement Income Outlook



Compare Your Income Needs and Income Sources

Plan for the Retirement Lifestyle You Want

Retirement Income Fact Finder

Sizing up your retirement readiness can be *simplified*. Just use this fact finder to help evaluate your expected expense **needs** and estimated income **sources**. Compare your needs (*below*) with your sources (*right*) to see where you stand for retirement.

NEEDS: List Your Expected Monthly Income Needs		
Need	Details	Monthly Amount
Housing	Mortgage/Rent/Fees	\$
	Taxes & Insurance	\$
	Utilities	\$
	Home Improvement	\$
	Maintenance & Repair	\$
Food	Groceries	\$
	Dining	\$
Transportation	Loan/Lease Payments	\$
	Taxes & Insurance	\$
	Fuel & Maintenance	\$
	Other	\$
Healthcare	Healthcare Coverage	\$
	Medicare	\$
	Co-pays & Uncovered Expenses	\$
	Drugs & Medical Supplies	\$
Insurance	Life Insurance	\$
	Long-Term Care	\$
Recreation	Entertainment	\$
	Travel	\$
	Hobbies	\$
Personal Care	Clothing	\$
	Products & Services	\$
Gifts	Cash & Presents	\$
	Charitable Donations	\$
Taxes	Income	\$
	Other	\$
Total		\$ A

SOURCES: List Your Expected Lifetime Income Sources		
Source	Guarantor	Monthly Income
Social Security	US Government	\$
Employer-Sponsored Pension Benefits		\$
Other Guaranteed Income		\$
Total		\$ B

COMPARE: List the Totals of Your Needs (A) and Sources (B)	
Category	Total
Primary Monthly Income Needs	\$ A
Guaranteed Monthly Income Sources	\$ B
Surplus or Shortage	+ / -

What's the Difference?

If **A** is larger than **B**, you may not have enough lifetime retirement income.

List Your Investable Holdings		
Asset	Source	Value
Savings		\$
CDs & Money Market Accts.		\$
Mutual Funds		\$
Stocks & Bonds		\$
IRAs & Qualified Plans		\$
Business/Property		\$
Total		\$

Make a Plan

Do you need more income to cover your needs? Consider moving some of your assets (left) into a different financial services product. Doing so may help provide more **guaranteed income**.

Ask your financial professional about products and strategies and solutions that can help create your retirement income outcome.



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