

# Quick & Easy Retirement Income Worksheet



## How Much Might You Need in Retirement? *Find Out Fast ...*

Calculate your needs. Compare your resources. Identify any gaps. Consider guaranteed income strategies.

MONTHLY EXPENSES (NET)		
Housing	Mortgage/Rent/Utilities	\$
Food	Groceries/Dining Out	\$
Healthcare	Premiums/Copays/Meds	\$
Other	Personal/Gas/Etc.	\$
<b>TOTAL A</b>		<b>\$</b>

MONTHLY INCOME (NET)	
Social Security	\$
Pension Payouts	\$
Annuities	\$
Other	\$
<b>TOTAL B</b>	<b>\$</b>

### Is There an Income Gap in Your Future?

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

<b>TOTAL A:</b>	—	<b>TOTAL B:</b>	=	<b>INCOME GAP: +/-</b>
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*Guaranteed income strategies, such as annuities, can help bridge income gaps for a more secure retirement.*

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