

# Quick & Easy Retirement Income Worksheet

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

Estimate 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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For information about how annuities can help provide guaranteed **income now** or **income later** that can last a lifetime, see your financial representative.

An annuity is a long-term financial vehicle designed for retirement. An insurance company accepts premiums and provides future income or a lump-sum amount to the contract owner by contractual agreement. Annuity contracts have terms and limitations for keeping them in force. Please contact a financial representative for complete details.

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