

RETIREMENT GOAL WORKSHEET

Please input the **ANNUAL** expenses you need to live on and additional wants you desire for your retirement not including income taxes. Do not factor in inflation but figure these amounts in today's dollars. For retirement expenses, please input what you would need to have at retirement as well as additional wanted numbers. Please note, input only the additional amount over the "Needs" amount in the "Wants" column for any category of wants that is higher than needs. Input your desired retirement age under "Wants" and the oldest age you would accept retirement under "Needs". If you are married, under the Survivor Amount column put the amount that the survivor would need for that expense when the first spouse dies.

ANNUAL EXPENSES	RETIREMENT NEEDS	RETIREMENT WANTS	SURVIVOR AMOUNT
Projected Retirement Age			
Mortgage: Mortgage Ends / /			
Real Estate Taxes			
Rent or Facility/Condo Fees			
Groceries			
Utilities			
Telephone/Cable/Internet			
Home Repair, Maintenance, or Improvements			
Clothing and Dry Cleaning			
Insurance: Auto, Home, And Liability			
Insurance: Long Term Care			
Medical Out of Pocket Expense and Insurance			
Automobile Repair and Maintenance			
Hobbies and Self Improvement			
Meals Out and Entertainment			
Gas and Public Transportation			
Gifts (Christmas, Birthdays, Occasions)			
Vacation and Travel			
Charitable Donations			
Personal Care			
Financial Planning and Tax Preparation			
Household and Miscellaneous			
Other Loan Payments			
Savings			
Total Expenses			