



# Retirement Income Worksheet

	AGE AT RETIREMENT
Name	
Name	

	MONTHLY ESTIMATE
<b>Earned Income in Retirement</b>	

<b>Fixed Income</b>	
Social Security	
Social Security	
Pension	
Other	
<b>Total Monthly Fixed Income</b>	\$

	ACCOUNT BALANCE
<b>Portfolio Income Calculator</b>	
401(k)	
403(b)	
IRA's	
Roth IRA's	
Investment Accounts	
Other	
<b>Total Retirement Portfolio</b>	\$
multiply portfolio total by .04	\$
divide this number by 12	\$
<b>Total Monthly Portfolio Income</b>	\$

<b>Pre-Tax Total Monthly Income</b>	\$
multiply by .85	\$

<b>After-Tax Retirement Income Estimate</b>	\$
---	----

<b>Estimate of Monthly Expenses from Expense Worksheet</b>	\$
--	----

This worksheet is intended to be used as an initial estimate of your retirement income.

Variables such as when you decide to start various income sources, the specific tax rate for your situation, how your portfolio is invested, and more will all have an effect on your actual results