

Retirement Planning Budget Worksheet

Name _____ Date _____

		Young Retirement	Retirement
		First 10 Years	After first 10 years
		Age _____ to _____	Age _____ to _____
		Monthly or Annual	Monthly or Annual
Credit Cards	Average Credit Card bill last 2 years		
	Average Credit Card bill last 2 years		
	Expenses not on the Credit Cards:		
Home Expenses	Mortgage Payment (P&I)		
(not on credit card)	Property Taxes		
	Home Owners Insurance		
	Homes Association Fees		
	Gas, Water, Electric, Trash		
	Phone, Cable, Internet		
	Repairs & Maintenance		
	Landscape, Pest Control		
	Household Furnishings		
Auto Expenses	Car Payments		
(not on credit card)	Auto Insurance		
	Property Taxes on autos		
	Repairs/Maintenance		
Living Expenses	Groceries		
(not on credit card)	Life Insurance		
	Medical & Dental Insurance		
	Prescriptions		
	Clothing		
	Entertainment		
	Newspaper/Magazines		
	Charitable Donations		
	Vacations & Travel		
	Birthday/Christmas Fund		
	Health Club		
	Spending Money		
	Hobbies		
Other Expenses			
Totals			