

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.	\$
TOTAL A		\$

MONTHLY INCOME (NET)	
Social Security	\$
Pension Payouts	\$
Annuities	\$
Other	\$
TOTAL 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.

TOTAL A:	—	TOTAL B:	=	INCOME GAP: +/-
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For protected guaranteed **income now** or **income later** that can last a lifetime, see your representative. For more information, try our Retirement Income Calculator at WSFinancialPartners.com/IncomeInputs.



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