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# Retirement Expenses Worksheet





# Capital Growth's Retirement Expenses Worksheet

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An important step in any retirement plan is knowing how much you'll be spending month-to-month. Get a better understanding of your total monthly expenses with our worksheet. Just fill out the sections that relate to your needs and add it up.



## Some Things to Remember

Everyone's retirement plan is unique. To get a better sense of your expenses and goals, answer the questions below.

1. When do you want to retire?

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2. Will your children need continued financial support?

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3. Do you foresee any extra expenses? (Pets, secondary property taxes, maids)

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4. Will you have debt going into retirement? If so, how much?

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5. What will your hobbies and interests cost you, roughly? (Golf, travel, yoga, etc)

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*The answers to these questions can be added to the miscellaneous section of the worksheet.*



# Calculate Your Monthly Retirement Expenses

The biggest factor in determining how much you'll need to save is your monthly expenses. To have a better understanding of your monthly needs, fill out the form below.

Housing	Total - \$
Morgage / Rent	\$
Property Taxes	\$
Home Insurance	\$
Utilities	\$
Condo Maintenance Fees	\$

Food	Total - \$
Monthly Groceries	\$
Dining Out	\$

Health Care	Total - \$
Insurance	\$
Medications	\$
Medical Treatment	\$

Transportation	Total - \$
Vehicle Payments	\$
Maintenance	\$
Auto Insurance	\$
Fuel	\$
Public Transportation	\$

Family Care	Total - \$
Alimony	\$
Child Care	\$
Spouse Care	\$

Insurance	Total - \$
Disability Insurance	\$
Life Insurance	\$
Family Insurance	\$
Long-Term Care Insurance	\$
Other	\$

Self Care	Total - \$
Clothing	\$
Products	\$
Hobbies	\$

Miscellaneous	Total - \$
Loans	\$
Education	\$
Charitable Donations	\$
Gifts	\$
Other	\$

<b>Monthly Total</b>	\$
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# Start Planning for Your Retirement Today

Talk with one of our professional advisors and find out how we can help you meet these monthly expenses throughout your golden years.

## Contact Info

☎ (858) 552-6960 or (800) 445-1048

📠 (858) 552-6969

✉ info@capitalgrowthinc.com

