
Retirement Expenses Worksheet





Capital Growth's Retirement Expenses Worksheet



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?

2. Will your children need continued financial support?

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

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

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

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	\$

Monthly Total	\$
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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

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