

RETIREMENT BUDGET WORKSHEET

Retirement Income Sources	Monthly	Annual
Social Security	\$	\$
Work Earnings	\$	\$
Company Pension	\$	\$
401(k) Plan	\$	\$
Retirement Accounts	\$	\$
Taxable Investment Accounts	\$	\$
Annuity	\$	\$
Rental Income	\$	\$
Business Interests	\$	\$
Other	\$	\$
Taxes		
Taxes	Monthly	Annual
Income Tax	\$	\$
Property Tax	\$	\$
Capital Gains Tax	\$	\$
Business/Corporate Taxes	\$	\$
Other	\$	\$
Household Expenses		
Household Expenses	Monthly	Annual
Rent	\$	\$
HOA Fees	\$	\$
Homeowners/Rental Insurance	\$	\$
Home Maintenance/Repairs	\$	\$
Home Improvements	\$	\$
Security System	\$	\$
Home appliances	\$	\$
Furniture	\$	\$
Other	\$	\$
Utilities		
Utilities	Monthly	Annual
Electricity	\$	\$
Water	\$	\$
Gas	\$	\$
Cable/Satellite TV	\$	\$
Internet	\$	\$
Phone/Data Plan	\$	\$
Other	\$	\$

Securities and advisory services offered through Royal Alliance Associates, Inc. Member FINRA/SIPC. Additional advisory and financial planning offered through Affiliated Advisors, Inc. Insurance services offered through Eastern Planning Inc. Listed entities not affiliated with Royal Alliance.

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Food	Monthly	Annual
Groceries	\$	\$
Beverages	\$	\$
Entertaining (Parties, Special Events)	\$	\$
Restaurants	\$	\$

Health Care	Monthly	Annual
Medicare/Supplemental Insurance Premiums	\$	\$
Deductible	\$	\$
Co-Payments	\$	\$
Co-Insurance	\$	\$
Eye Doctor/Glasses	\$	\$
Dental	\$	\$
Prescriptions/Over-the-Counter Medications	\$	\$
Vitamins	\$	\$
Fitness (yoga, personal trainer, YMCA, etc.)	\$	\$
Life Insurance	\$	\$
Long-Term Care	\$	\$
Other	\$	\$

Transportation	Monthly	Annual
Car Lease Payments	\$	\$
Auto Insurance	\$	\$
Registration	\$	\$
Gas	\$	\$
Maintenance	\$	\$
Repairs	\$	\$
Upgrades	\$	\$
Other	\$	\$

Personal Care	Monthly	Annual
Clothing	\$	\$
Tailor	\$	\$
Dry Cleaning	\$	\$
Toiletries	\$	\$
Feminine Products	\$	\$
Cosmetics	\$	\$

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Hair	\$	\$
Nails	\$	\$
Facials	\$	\$
Shoe Shine	\$	\$
Massage	\$	\$
Other	\$	\$

Child Care	Monthly	Annual
Child Support Payments	\$	\$
Day Care/Babysitting	\$	\$
Education	\$	\$
Sports	\$	\$
Recreational Activities	\$	\$
Summer Camp	\$	\$
Other	\$	\$

Pet Care	Monthly	Annual
Food	\$	\$
Grooming	\$	\$
Boarding	\$	\$
Veterinarian	\$	\$
Medication	\$	\$
Pet Insurance	\$	\$
Clothing	\$	\$
Other	\$	\$

Professional Services	Monthly	Annual
Accountant	\$	\$
Financial Planner	\$	\$
Lawyer	\$	\$
Business Consultant	\$	\$
Other	\$	\$

Debt Payments	Monthly	Annual
Mortgage	\$	\$
Student Loans	\$	\$
Car Loans	\$	\$
Credit Cards	\$	\$

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Business Loans	\$	\$
Bank Loans	\$	\$
Other	\$	\$
Education/Self Improvement	Monthly	Annual
College	\$	\$
Classes	\$	\$
Books	\$	\$
Subscriptions	\$	\$
Supplies	\$	\$
Other	\$	\$
Entertainment/Recreation	Monthly	Annual
Sports	\$	\$
Theater	\$	\$
Camping	\$	\$
Movies	\$	\$
Music	\$	\$
Museums	\$	\$
Other Hobbies	\$	\$
Club Membership Fees	\$	\$
Digital Devices	\$	\$
Other	\$	\$
Vacations/Travel	Monthly	Annual
Travel Tickets	\$	\$
Hotels/Lodging	\$	\$
Food	\$	\$
Auto	\$	\$
Entertainment	\$	\$
Souvenirs	\$	\$
Other	\$	\$
Miscellaneous	Monthly	Annual
Charitable Cash Donations	\$	\$
Gifts	\$	\$
Alimony	\$	\$
Other	\$	\$
Total:	\$	\$

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