

Retirement Budget

- CONFIDENTIAL -

MY CURRENT MONTHLY EXPENSES

Combined Net Monthly Income	
Housing	
Rent/Mortgage	
Property taxes	
Maintenance	
Insurance	
Total Housing	
Utilities	
Hydro	
Gas	
Sewer and water	
Phone(s)	
Internet	
TV cable/Satellite	
Total Utilities	
Car	
Loan/Lease payment	
Insurance	
Gas	
Repairs	
Total Car	
Personal Insurance	
Health insurance	
Disability insurance	
Life insurance	
Total Personal Insurance	
Financial	
Personal loans	
Bank fees	
Credit cards	
Savings	
Company pension contributions	
Stock purchase plan	
Total Financial	

MY MONTHLY EXPENSES AFTER I RETIRE

Combined Net Monthly Income	
Housing	
Rent/Mortgage	
Property taxes	
Maintenance	
Insurance	
Total Housing	
Utilities	
Hydro	
Gas	
Sewer and water	
Phone(s)	
Internet	
TV cable/Satellite	
Total Utilities	
Car	
Loan/Lease payment	
Insurance	
Gas	
Repairs	
Total Car	
Personal Insurance	
Health insurance	
Disability insurance	
Life insurance	
Total Personal Insurance	
Financial	
Personal loans	
Bank fees	
Credit cards	
Savings	
Total Financial	

MY CURRENT MONTHLY EXPENSES

Taxes	
Income tax	
CPP and EI premiums	
Total Taxes	
Other Expenses	
Groceries	
Restaurants	
Personal clothing	
Clothing for work	
Toiletries	
Medical	
Dental	
Travel to work	
Entertainment	
Magazines, books & newspapers	
Hobbies	
Vacation/travel	
Gifts	
Donations	
Miscellaneous	
Total Other Expenses	
TOTAL EXPENSES	
BALANCE	

MY MONTHLY EXPENSES AFTER I RETIRE

Taxes	
Income tax	
Total Taxes	
Other Expenses	
Groceries	
Restaurants	
Personal clothing	
Toiletries	
Medical	
Dental	
Entertainment	
Magazines, books & newspapers	
Hobbies	
Vacation/travel	
Gifts	
Donations	
Miscellaneous	
Total Other Expenses	
TOTAL EXPENSES	
BALANCE	