

# Retirement Expenses Worksheet

This worksheet can help you estimate your monthly expenses in retirement. Enter your estimated expenses for each category and add together for your total. You may want to save your worksheet for future reference.

## Monthly Expenses

| Housing               |    |
|-----------------------|----|
| Mortgage              | \$ |
| Property Taxes        | \$ |
| Homeowners Insurance  | \$ |
| Rent                  | \$ |
| Utilities             | \$ |
| Maintenance/Fees      | \$ |
| Sub-Total             | \$ |
| Food                  |    |
| Groceries             | \$ |
| Dining out            | \$ |
| Sub-Total             | \$ |
| Transportation        |    |
| Vehicle Maintenance   | \$ |
| Fuel                  | \$ |
| Auto Insurance        | \$ |
| Public Transportation | \$ |
| Sub-Total             | \$ |

| Health Care              |    |
|--------------------------|----|
| Medical Services         | \$ |
| Medications and Supplies | \$ |
| Health Insurance         | \$ |
| Sub-Total                | \$ |
| Personal Insurance       |    |
| Life Insurance           | \$ |
| Disability Insurance     | \$ |
| Long-Term Care Insurance | \$ |
| Other Insurances         | \$ |
| Sub Totals               | \$ |
| Personal Care            |    |
| Clothing                 | \$ |
| Products and Services    | \$ |
| Sub-Total                | \$ |
| Family Care              |    |
| Alimony                  | \$ |
| Child Care               | \$ |
| Sub-Total                | \$ |
| Miscellaneous            |    |
| Loans/Credit Cards       | \$ |
| Entertainment            | \$ |
| Travel / Vacation        | \$ |
| Hobbies                  | \$ |
| Gifts                    | \$ |
| Education                | \$ |
| Charitable Contributions | \$ |
| Other                    | \$ |
| Sub-Total                | \$ |
| Total Monthly Expenses   | \$ |