



Retirement Expense Plan

Enter your monthly costs. In Adobe Reader the Annual and At-Retirement columns fill in automatically.

Years until retirement:

Assumed inflation (%):

MONTHLY EXPENSES	Monthly	Annual	At Retirement
Housing (mortgage/rent, taxes)			
Utilities & home services			
Food & groceries			
Transportation & auto			
Healthcare & insurance			
Travel & leisure			
Miscellaneous			
TOTAL EXPENSES			

EXPECTED RETIREMENT INCOME	Annual
Social Security	
Pension / FERS	
TSP / 401(k) / IRA withdrawals	
Other income	
TOTAL INCOME	

THE GAP (income - inflation-adjusted expenses)