

35 West Slade Street • Palatine, Illinois 60067  
847-330-9911 • fax 847-330-9922 • www.guidantwealth.com

Securities offered through LPL Financial, Member FINRA/SIPC



## RETIREMENT INCOME ANALYSIS WORKSHEET

Analyze your monthly living expenses:

### ESSENTIALS

Mortgage/Rent: \_\_\_\_\_

Food/Toiletries: \_\_\_\_\_

Prescriptions/Copayments: \_\_\_\_\_

Car/public Transportation: \_\_\_\_\_

### INSURANCE

Homeowners: \_\_\_\_\_

Car: \_\_\_\_\_

Health: \_\_\_\_\_

Dental: \_\_\_\_\_

Long-term Care: \_\_\_\_\_

### TAXES

Income: \_\_\_\_\_

Property: \_\_\_\_\_

Vehicle: \_\_\_\_\_

### OTHER

Debt: \_\_\_\_\_

Discretionary: \_\_\_\_\_

TOTAL: \_\_\_\_\_ = A

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## Analyze your monthly retirement income:

### GUARANTEED (payments may fluctuate):

Social Security: \_\_\_\_\_

Company Pension: \_\_\_\_\_

**TOTAL:** \_\_\_\_\_ = **B**

### NONGUARANTEED:

Dividends: \_\_\_\_\_

Interest: \_\_\_\_\_

Retirement Accounts: \_\_\_\_\_

**TOTAL:** \_\_\_\_\_ = **C**

Monthly Retirement Income Analysis: **B + C** = \_\_\_\_\_ - **A** = \_\_\_\_\_

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### RETIREMENT Q & A EVENTS:

Saturday, October 5, 2013: Retirement: Medicare

Saturday, November 2, 2013: Retirement: Social Security

### LEARN MORE:

GuidantWealth.com