

BASIC RETIREMENT BUDGET

INCOME	MONTHLY	ANNUALLY	NOTES
Social Security			
Pension Income			
401(k) Payout Income			
Rental Income			
Other			
TOTAL INCOME			

HOUSING COSTS	MONTHLY	ANNUALLY	NOTES
Mortgage or Rent Payments			
Real Estate Taxes			
Maintenance & Repair			
Home Insurance			
Other			

PERSONAL EXPENSES		
Grooming		
Clothing		
Holidays/Travel		
Auto Expenses		
Other		

DAILY LIVING EXPENSES		
Groceries		
Entertainment		
Utilities		
Gas		
Other		

MEDICAL EXPENSES		
Medical Insurance		
Prescriptions		
Co-Pays		

TOTAL EXPENSES		
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SUMMARY	MONTHLY	ANNUALLY	NOTES
TOTAL INCOME			
(TOTAL EXPENSES)			
OVER/(UNDER)			