

Name(s): \_\_\_\_\_

Date: \_\_\_\_\_

## RETIRING FITT

### Budget Worksheet

Expenditure Categories	3 Months Ago	2 Months Ago	Last Month	Typical Month	Projected Retirement Month
Charities					
Savings					
Mortgage					
Homeowner Insurance					
Real Estate Taxes					
Utilities					
Medical Insurance					
Long Term Care Insurance					
Life Insurance					
Auto Insurance					
Groceries					
Restaurants					
Fuel					
Phones					
Internet/TV					
Personal/Entertainment					
Clothing					
Travel					
Car Payments					
Credit Cards					
Miscellaneous					
<b>Total Monthly Expenses</b>					



**Tips:** - Try to have 30 or fewer categories  
 - Divide annual expenses by 12 and insert in Typical Month and Projected Retirement columns

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<b>Total Monthly Expenses</b>					

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