

# Your Retirement Income Worksheet

This worksheet will give you an idea of what your income in retirement will look like. Please enter monthly amounts before taxes.

## Guaranteed Income

<b>Defined Benefit Pension</b>	
My benefit	\$
Other benefit	\$
<b>Defined Benefit Supplement Payment</b>	
Lifetime monthly annuity	\$
<b>Social Security</b>	
My benefit	\$
Other benefit	\$
<b>Veteran's Benefit</b>	
My benefit	\$
Other benefit	\$
<b>Annuities</b>	
My annuity income	\$
Other annuity income	\$
<b>Other Guaranteed Income</b>	
Other income	\$
<b>Total Guaranteed Monthly Income</b>	
<b>Total Guaranteed Monthly Income</b>	\$

## Non-Guaranteed Income

<b>403(b), 457(b), 401(k), IRA</b>	
Monthly distributions	\$
<b>Roth 403(b), Roth 401(k), Roth IRA</b>	
Monthly distributions	\$
<b>Brokerage/Savings Accounts</b>	
Monthly distributions	\$
<b>Work/Part-Time Work</b>	
Income	\$
<b>Income Outside of Work</b>	
Real estate rental income	\$
Other annuity income	\$
Other	\$
<b>Total Non-Guaranteed Monthly Income</b>	
<b>Total Non-Guaranteed Monthly Income</b>	\$

<b>TOTAL MONTHLY INCOME</b>	\$
-----------------------------	----



### Guaranteed Income Checklist

- Have I received estimates of my monthly benefits from all sources?
- Do these income sources adjust with inflation?
- What are the tax considerations of these income sources?
- What happens to these income sources if I or my significant other dies?



### Non-Guaranteed Income Checklist

- Do I have a strategy for taking distributions from each account?
- Have I looked into converting these accounts to guaranteed income, if needed?
- How do the IRS required minimum distribution rules affect these accounts?
- What are the tax considerations of these income sources?

