

Retirement Worksheet (2)

SOURCES OF RETIREMENT INCOME	AMOUNT
Social Security	\$
Withdrawals from retirement savings plans	\$
Pension	\$
Interest, dividends, investment income	\$
Property	\$
Part-time work	\$
Investment principal	\$
Other	\$

ANTICIPATED RETIREMENT EXPENSES	AMOUNT
Shelter	\$
Food (home and dining out)	\$
Clothing	\$
Medical costs	\$
Emergencies	\$
Support for others	\$
Insurance	\$
Travel	\$
Entertainment	\$
Miscellaneous expenses	\$

NEAR RETIREMENT CHECKLIST
<input type="checkbox"/> Modify investment strategy <ul style="list-style-type: none"> • More conservative portfolio mix • Income-producing investments
<input type="checkbox"/> Plan for retirement activities
<input type="checkbox"/> Line up sources of first-year income
<input type="checkbox"/> Check Social Security benefits
<input type="checkbox"/> Learn about withdrawal requirements
<input type="checkbox"/> Set up an emergency fund
<input type="checkbox"/> Consider long-term health care insurance
<input type="checkbox"/> Review your insurance coverage
<input type="checkbox"/> Update your will
<input type="checkbox"/> Update your estate plan <ul style="list-style-type: none"> • Value of assets • Beneficiaries • Gifts and bequests • Inheritance taxes