

A Retirement Planning Worksheet

Current Date: 45617

Personal and Financial Data

Current Age: 79
 Date of Birth: 16626
 Anticipated Retirement Age: 60
 Years Until Retirement: 15.03

Current Annual Income: \$80,000
 Anticipated Average Annual Raise: 5.00%

Projected Annual Salary at Retirement: 166557.87

Retirement Income Ratio: 70.0%
 Needed Retirement Income: 116590.51

Current Maximum Social Security Benefits: \$11,712
 Anticipated Average Annual Inflation: 4.00%

Life Expectancy After Retirement: 25

Accumulated Funds at Retirement

Current Value of Savings: \$50,000
 Anticipated Average Annual Return: 8.0%

Future Value of Savings: 158975.08

Annual Income Sources at Retirement

Post-Retirement Return on Investments:	6.00%	
	Income Only	Annuity
Income from Savings:	9538.5047	12436.1

Anticipated Inflation Adjusted Social Security: 21117.483
 Anticipated Pension: \$85,000

Anticipated Total Retirement Income:	115656	118553.6
Annual Income Excess/(Shortfall):	-934.5196	1963.074
Additional Total Accumulation Necessary at	15575.326	0
Additional Monthly Accumulation Necessary	10.939292	0