

Sheet1

A Retirement Planning Worksheet

Current Date:

Personal and Financial Data

Current Age:

Date of Birth:

Anticipated Retirement Age:

Years Until Retirement:

Current Annual Income:

Anticipated Average Annual Raise:

Projected Annual Salary at Retirement:

Retirement Income Ratio:

Needed Retirement Income:

Current Maximum Social Security Benefits:

Anticipated Average Annual Inflation:

Life Expectancy After Retirement:

Accumulated Funds at Retirement

Current Value of Savings:

Anticipated Average Annual Return:

Future Value of Savings:

Annual Income Sources at Retirement

Post-Retirement Return on Investments:

Income from Savings:

Anticipated Inflation Adjusted Social Security Benefits:

Anticipated Pension:

Anticipated Total Retirement Income:

Annual Income Excess/(Shortfall):

Additional Total Accumulation Necessary at Retirement:

Additional Monthly Accumulation Necessary:

11/21/2024

79.00
16626
60
15.03

\$80000
5.00%

\$166558

70.0%
\$116591

\$11712
4.00%

25

\$50000
8.0%

\$158975

6.00%	
Income Only	Annuity
\$9539	\$12,436.10

\$21117
\$85000

\$115656	\$118,553.58
-\$935	\$1,963.07
\$15575	\$0
\$10.94	\$0