



Wealth Enhancement®

Estimate your monthly retirement expenses

Living expenses	Monthly cost	Lifestyle expenses	Monthly cost
Housing e.g., mortgage payments, rent, insurance, property tax		Entertainment e.g., movies, theatre, sporting events and restaurants	
Utilities e.g., gas, water, electricity, telephone, cable		Travel & recreation e.g., hotels, airfare and RV/boat expenses	
Food/groceries/meals		Memberships e.g., golf, health club and yoga	
Transportation e.g., car payments, gas, car insurance, maintenance		Gifts and donations	
Personal e.g., clothing, haircuts, dry cleaning, toiletries		Other	
Health care e.g., medical insurance, vision/dental, prescriptions and other out-of-pocket expenses		Monthly lifestyle expenses	0
Life, disability, and long-term care insurance		Monthly living expenses	0
Other		Monthly lifestyle expenses	0
Monthly living expenses	0	Total expenses (Monthly living + lifestyle)	0

Guaranteed retirement income savings

Owner	Source (Social security/pension/annuity)	Monthly amount
Total		0