

# Retirement Expenses Worksheet



# MetLife

To complete this worksheet, fill in your current estimated annual expenses in dollar amounts in either the "Needs" or "Wants" column under Current Expenses. Then, decide if those expenses will increase, decrease, or go away altogether once you retire and fill in the new projected estimated annual dollar amount into your "Needs" or "Wants" column under Retirement. Once you're done, total up your expenses in retirement and enter it on the questionnaire on the line *Income Goal For Retirement Expense* on the Income Selector Questionnaire.

	Current Expenses		Retirement	
	Needs	Wants	Needs	Wants
<b>Housing and Related Expenses</b>				
Rent / mortgage				
Condo / association fees				
Heat / AC / electric				
Phone (home and cell)				
Water / sewer / garbage				
Property taxes				
Homeowners insurance				
Property care (lawn, etc.)				
Home maintenance (repairs, etc.)				
Cable TV / internet				
Housing Totals				
<b>Transportation Expenses</b>				
Car payments / lease				
License / registration / maintenance				
Gasoline				
Auto insurance				
Parking / bus / train / air / taxi, etc.				
Transportation Totals				
<b>Personal Expenses</b>				
Groceries / dining out / take-out				
Personal care (e.g., hairdresser)				
Clothing / shoes				
Exercise / hobbies / clubs				
Vacation / leisure / entertainment				
Education (you / spouse / children)				
Debts (other than car / mortgage)				
Charitable donations				
Gifts to children / grandchildren				
Gifts to others				
Federal income tax				
State income tax				
Personal Totals				
<b>Medical Expenses / Insurance Premiums</b>				
Out-of-pocket medical				
Out-of-pocket prescriptions				
Out-of-pocket eye care/glasses				
In-home care services				
Health Insurance Premiums (Medicaid/Medicare)				
Long-Term Care Insurance Premiums				
Life Insurance Premiums				
Disability Income Insurance Premiums				
Medical / Insurance Totals				

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# MetLife

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