



Current Annual Expenses Worksheet

Category	Current Annual Expenses
1. Housing Costs (rent or mortgage, taxes, utilities, and maintenance)	\$ _____
2. Necessities (groceries, clothing, etc.)	\$ _____
3. Taxes (e.g., income, property, capital gains)	\$ _____
4. Health Care (e.g., health insurance, co-pays)	\$ _____
5. Insurance (e.g., life insurance, homeowner's, auto)	\$ _____
6. Transportation (car payments, gas, maintenance)	\$ _____
7. Leisure Activities (hobbies, travel, entertainment)	\$ _____
8. Other Expenses (charities, gifts, etc.)	\$ _____
9. Outstanding Debt (e.g., loans, credit cards)	\$ _____
10. Savings (current contributions)	\$ _____
TOTAL Annual Expenses (in today's dollars)	\$ _____

This worksheet is part of "Life Advice: Retirement" at www.lifeadvice.com.

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