Grace Financial Services

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CA Insurance License No. 0623165

Retirement Budget Sheet

Taxable Income	Before Retirement	After Retirement
Salary	$	$
Bonus	$	$
Dividends	$	$
Interest	$	$
Proceeds from Securities	$	$
Rental Income	$	$
Trust Income	$	$
Social Security	$	$
Pension	$	$
Alimony	$	$
Child Support	$	$
Unemployment, Disability Insurance	$	$
Other Taxable Income	$	$
Total Taxable In-	$	$
Non– Taxable		
Name:	$	$
Name:	$	$
Name:	$	$
Total Non– Taxable Income	$	$

Grand Total	Before Retirement	After Retirement
Income	$	$
Expense	$	$

Fixed Expenses	Before Retirement	After Retirement
Mortgage/ Rent	$	$
Gas/ Electricity	$	$
Telephone	$	$
Water	$	$
Garbage	$	$
Real Estate Tax	$	$
Home Owners Insurance Premium	$	$
Automobile Insurance Premium	$	$
Medical/ Disability Insurance Premium	$	$
Life Insurance Premium	$	$
Automobile Loan	$	$
Loans	$	$
Total Fixed Expenses	$	$
Flexible Expenses		
Food/ Beverage	$	$
Clothing	$	$
Laundry/ Cleaning	$	$
Personal Care	$	$
Credit Cards	$	$
Entertainment/ Recreation	$	$
Travel/ Vacations	$	$
Gifts/ Donations	$	$
Health Care (Doctors, Medicine)	$	$
Child Care	$	$
Savings/ Investments	$	$
Retirement Savings	$	$
Personal Allowance	$	$
Gasoline/ Transportation	$	$
Other	$	$
Total Flexible Expenses	$	$
Tax Expenses		
Federal Income Tax	$	$
State Income Tax	$	$
FICA/ Medicare/ OASDI	$	$
Self– Employment	$	$
Total Tax Expense	$	$