Retirement Income Planning Worksheet

Name: _____ **Date:** _____

Questions: How Much? How Long? What Sources? How Tax Efficient? Asset Preservation?

INCOME SOURCES	TODAY		AT RETIREMENT		AGE CHANGE IN RETIREMENT		DEATH OF		DEATH OF LAST SPOUSE
	Male Spouse Age:	Female Spouse Age:	Male Spouse Age:	Female Spouse Age:	Male Spouse Age:	Female Spouse Age:	Male Spouse	Female Spouse	Family Charity Revenue Canada
Employment Income									
Self Employed Inc.									
Disability Income • Ind/Group LTD • CPP Disability									
Pension Income									
CPP Retirement Inc.									
OAS									
Survivors Benefit: CPP/OAS									
RRIF/LIF/Annuity: Male Spouse Female Spouse Spousal Plan									
Non RSP Investment Income Individual Plans Joint Plans									
Rental Income									
Alimony/Child Support									
Total Individual Income									
Total Combined Income									
Less Living Expenses									
Excess/Shortfall									