

Retirement Budget Template

8/9/2022

Category / Expense	Monthly Expenses	Annual Expenses	Subtotal Annual	Pct.
<u>Mandatory (Fixed) Expenses</u>				
Food				
Groceries	0	0		
Total Groceries			0	0.0%
Health/Medical				
Doctors	0	0		
Medicine & Drugs	0	0		
Medical Equipment'	0	0		
Total Health/Medical			0	0.0%
Insurance				
Medical Insurance	0	0		
Dental Insurance	0	0		
Vision Insurance	0	0		
Accident Insurance	0	0		
Life Insurance	0	0		
Long Term Care Insurance	0	0		
Umbrella Insurance	0	0		
Total Insurance			0	0.0%
Income Taxes				
Federal Taxes	0	0		
State Taxes	0	0		
Local Taxes	0	0		
Social Security	0	0		
Medicare	0	0		
Total Income Taxes			0	0.0%
Transportation				
Public Transportation	0	0		
Auto Insurance	0	0		
Auto Registration	0	0		
Auto Fuel	0	0		
Automobile Repairs	0	0		
Auto Service & Tires	0	0		
Total Transportation			0	0.0%
Housing				
Real Estate Taxes	0	0		
Home Insurance	0	0		
Home Repair/Upkeep	0	0		
Gas & Electric	0	0		
Water	0	0		
Basic Phone Service	0	0		
Trash Collection	0	0		
Security	0	0		
Homeowner Association Dues	0	0		
Total Housing			0	0.0%
Total Mandatory Expense	=====	=====	=====	
Total Mandatory (from above)	0	0		100.0%

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Category / Expense	Monthly Expenses	Annual Expenses	Subtotal Annual	Pct.
<u>Discretionary Expenses</u>				
Food				
Restaurant	0	0		
Total Restaurant			0	0.0%
Entertainment & Recreation				
Vacation	0	0		
Recreational Travel	0	0		
Fees & Tickets	0	0		
Books & Subscriptions	0	0		
Computer Hardware/Software	0	0		
Streaming Services	0	0		
Electronic Games/Devices	0	0		
Cell/Smart Phones	0	0		
Total Entertain/Recreation			0	0.0%
Education				
Coursework	0	0		
Licensing	0	0		
Total Education			0	0.0%
Clothing				
Total Clothing			0	0.0%
Housing				
Furniture & Appliances	0	0		
Cable/Satellite TV	0	0		
Internet	0	0		
Total Discretionary Housing			0	0.0%
Miscellaneous/Other				
Church/Charity	0	0		
Gifts (Birthday, X-Mas, etc.)	0	0		
Spending Money	0	0		
Personal Care	0	0		
Merchandise	0	0		
Bank Charges	0	0		
Total Miscellaneous/Other			0	0.0%
Total Discretionary Expense	=====	=====	=====	
Total Discretionary (from above)	0	0		100.0%
<u>Grand Totals</u>				
Mandatory	0	0		0.0%
Discretionary	0	0		0.0%
	=====	=====	=====	
TOTAL BUDGET	0	0		100.0%