

Confidential Family Budget Worksheet

	Current Monthly Amount	Estimated Monthly Amount at Retirement
Housing		
Mortgage		
Rent		
Heat/Gas		
Water		
Hydro		
Phone		
Cable		
Groceries		
Maintenance		
Insurance		
Miscellaneous		
Transportation		
Loan/Lease Payment		
Repairs		
Auto/Gas		
Parking		
Insurance		
Auto Club		
Miscellaneous		
Entertainment		
Restaurant		
Club Memberships		
Hobbies		
Vacations		
Miscellaneous		
Personal		
Prescriptions		
Church / Charities		
Gifts		
Clothing (incl. Dry cleaning)		
Medical / Dental		
Miscellaneous		
Other		
Savings / Investments		
Life Insurance		
Education		
Income Tax Payments		
Debt Reduction		
Union Dues		
Pet Care		
Miscellaneous		
Total Expenses	\$	\$
Net Income		
Salary		
Canada Pension Plan		
Old Age Security (age 65)		
RRIF Income		
Annuity/LIF Income		
Other Income		
Total Income	\$	\$
Difference	\$	\$