

Retirement Income Planning Worksheet

Name: _____ Date: _____

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 CCRA
Current Income Sources									
Employment Income									
Investment/Rental Income									
Disability Income <ul style="list-style-type: none"> • Ind/Group LTD • CPP Disability 									
Retirement Income Sources									
D.B. Pension Plan MV \$ _____									
D.C. Pension Plan MV \$ _____									
CPP									
OAS									
Survivors Benefit: CPP/OAS									
RRIF/LIF/Annuity: Male RSP Value: \$ _____ Male Spousal RSP Value: \$ _____ Female RSP Value: \$ _____ Female Spousal RSP Value: \$ _____									
Non RSP Investments Income Male Individual Plans \$ _____ Female Individual Plan \$ _____ Joint Plans \$ _____									
Other Income									
Estimated Individual Gross Income									
Estimate of Fed/Prov Tax Rates									
Estimated Individual Net Income									
Estimated Combined Net Income									
Less Living Expenses									
Excess/Shortfall									