



*Annual*  
**Retirement Blueprint Reassessment™**  
**PRIORITIES UPDATE**

Name: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_



# The Retirement Income Predictor™

Monthly Inflow						
Name	Source	Income Begin Date	Income End Date	Monthly (Pre-Tax) Amount of Income	Annual (Pre-Tax) Amount of Income	Cost of Living Adjustment
	Work Income <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Work Income <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Work Income <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Work Income <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Social Security <small>(total pre-tax/medicare)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Social Security <small>total pre-tax/medicare)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Pension <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Pension <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Pension <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Pension <small>(total pre-tax)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Rental <small>(total gross)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Rental <small>(total gross)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Rental <small>(total gross)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Rental <small>(total gross)</small>			\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Monthly Inflow Totals:</b>				\$	\$	

# The Lifestyle Cost Estimator™

## Average Monthly/Annual FIXED Expenses (I)

	Monthly	Annually
<b>Home</b>		
Mortgage (Principal and Interest Only)	\$	\$
Mortgage (Principal and Interest Only)	\$	\$
Home Equity Line of Credit (Minimum Payment Due)	\$	\$
Rent	\$	\$
Real Estate Taxes	\$	\$
Residence Fee (Condominium fee)	\$	\$
Oil / Gas	\$	\$
Electric	\$	\$
Water / Sewer	\$	\$
Cable TV / Internet / Telephone	\$	\$
Smart Phone (Cell)	\$	\$
Home Repair / Maintenance (Annual Allotment)	\$	\$
Landscaping / Lawn Care	\$	\$
Snow Removal	\$	\$
Trash Removal	\$	\$
House Cleaning	\$	\$
<b>Subtotal (Home)</b>	\$	\$
<b>Transportation</b>		
Gas / Fuel	\$	\$
Lease / Loan / Future Auto Purchases	\$	\$
Lease / Loan / Future Auto Purchases	\$	\$
Car Wash / Detailing Services	\$	\$
Excise Tax	\$	\$
Repairs / Maintenance	\$	\$
Parking / Public Transportation / Fast Lane	\$	\$
Boat Expenses	\$	\$
<b>Subtotal (Transportation)</b>	\$	\$
<b>Fixed Expenses (Page 3)</b>	\$	\$

# The Lifestyle Cost Estimator™

Average Monthly/Annual FIXED Expenses (2)		
	Monthly	Annually
<b>Personal Consumption</b>		
Groceries	\$	\$
Clothing (Fixed) including eye glasses, shoes, undergarments, coats, etc.	\$	\$
Dry Cleaning	\$	\$
Haircuts / Salon	\$	\$
Health / Personal Care Products (CVS, Walgreens, etc.)	\$	\$
Sports / Fitness / Health Club / Membership Fees	\$	\$
Chiropractic Care	\$	\$
Massage Treatments	\$	\$
Vitamins	\$	\$
Medical / Dental / Pharmacy (Out of Pocket)	\$	\$
Pet Expenses (Food, Cleaning, Veterinary)	\$	\$
Professional / Advisor Fees (Accountant, Attorney, etc.)	\$	\$
Rental Property Expenses (Total)	\$	\$
Vacation / Second Home Expenses (Total)	\$	\$
	\$	\$
	\$	\$
	\$	\$
<b>Subtotal (Personal Consumption)</b>	\$	\$
<b>Insurance</b>		
Auto	\$	\$
Home	\$	\$
Umbrella	\$	\$
Life	\$	\$
Long Term Care	\$	\$
Health	\$	\$
Boat	\$	\$
Medicare Deduction	\$	\$
<b>Subtotal (Insurance)</b>	\$	\$
<b>Fixed Expenses (Page 4)</b>	\$	\$



# The Lifestyle Cost Estimator™

Future Large Expenses		
In addition to your average monthly and annual expenses, over the next five (5) years, where will you be spending money?		
	Anticipated Project Year	Projected Cost
<b>Home Improvements</b>		
		\$
		\$
		\$
		\$
		\$
		\$
<b>Furniture</b>		
		\$
		\$
		\$
<b>Appliances</b>		
		\$
		\$
		\$
<b>New Home</b>		
		\$
<b>New Vacation Home</b>		
		\$
<b>Special Vacations/Events/Weddings (Outside of Annual Spending)</b>		
		\$
		\$
<b>Cars, Boats, etc....</b>		
		\$
		\$
		\$
<b>Short Term Debt</b>		
		\$
<b>Total Future Large Upcoming Expenses</b>		\$



**The  
Relaxing  
Retirement  
Coach, Inc.**

Wellesley Office Park  
80 William Street, Suite 260  
Wellesley, MA 02481  
781-235-7550 phone  
781-235-7551 fax