



The Retirement Bucket™

Name: _____

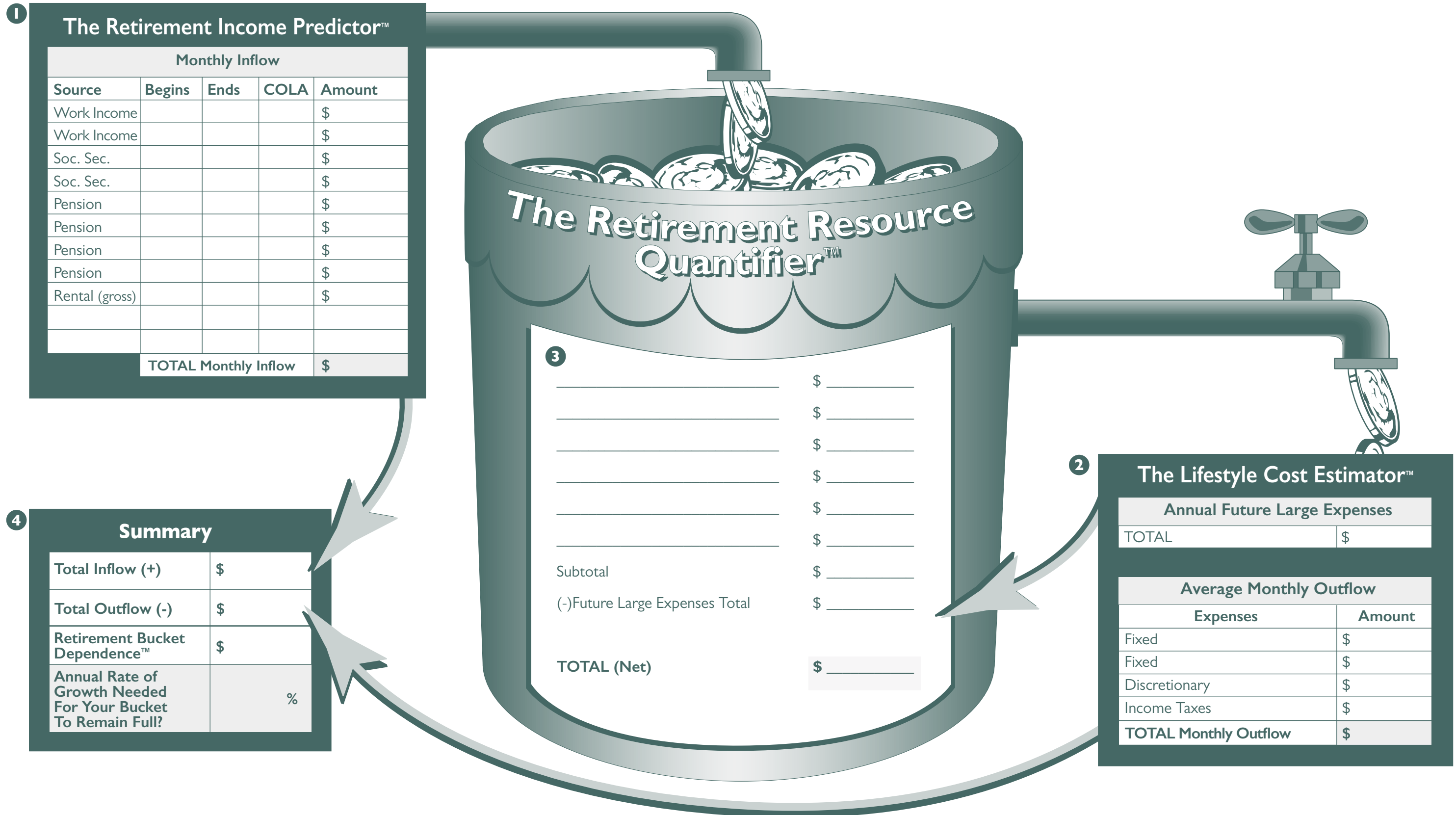
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The Retirement Bucket™



1 The Retirement Income Predictor™

Monthly Inflow				
Source	Begins	Ends	COLA	Amount
Work Income				\$
Work Income				\$
Soc. Sec.				\$
Soc. Sec.				\$
Pension				\$
Pension				\$
Pension				\$
Pension				\$
Rental (gross)				\$
TOTAL Monthly Inflow				\$

4 Summary

Total Inflow (+)	\$	
Total Outflow (-)	\$	
Retirement Bucket Dependence™	\$	
Annual Rate of Growth Needed For Your Bucket To Remain Full?		%

The Retirement Resource Quantifier™

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Subtotal	\$ _____
(-)Future Large Expenses Total	\$ _____
TOTAL (Net)	\$ _____

2 The Lifestyle Cost Estimator™

Annual Future Large Expenses	
TOTAL	\$ _____

Average Monthly Outflow	
Expenses	Amount
Fixed	\$ _____
Fixed	\$ _____
Discretionary	\$ _____
Income Taxes	\$ _____
TOTAL Monthly Outflow	\$ _____