

Retirement Income Sources Worksheet

This worksheet helps you list and organize all the income sources you expect to have in retirement. By identifying amounts, start dates, and reliability, you can see how they fit together and spot any gaps in your plan.

Instructions

1. List each income source in the appropriate section below.
2. Include the monthly amount and expected start date.
3. Mark whether it is guaranteed, variable, or one-time.
4. Add notes about inflation protection, taxes, or survivor benefits.
5. Total each category, then add up for your projected total retirement income.

Income Source	Monthly Amount	Start Date	Type (G/V/O)	Notes
--- Social Security ---				
--- Pensions ---				
--- Annuities ---				
--- Personal Savings & Investments ---				
--- Part-Time Work ---				
--- Other Sources ---				
TOTAL MONTHLY RETIREMENT INCOME				