

D) Discretionary Income Gap (B)

Please fill in the following sources of retirement income you are receiving in the current year and expect to receive in year 1 and through the three stages of your retirement.

Managed Resources

	Current Value	Current Monthly Income	Year 1	Stage 1 Year ____	Stage 2 Year ____	Stage 3 Year ____
Name: _____		Age: _____				
Name: _____		Age: _____				
Years of retirement						
Employee Savings Plan	\$	\$	\$	\$	\$	\$
Traditional IRA						
Roth IRA						
Brokerage Account						
Other Savings SRP						
Life Insurance Cash Value						
Home Equity						
Employment Income						
Employment Income						
Interest & Dividends						
Asset Total:	\$					
SUBTOTAL Managed Resources Income		\$	\$	\$	\$	\$
Less: Discretionary expenses		\$	\$	\$	\$	\$
Discretionary Income Gap (B)		\$	\$	\$	\$	\$
Total Gaps (A) and (B)		\$	\$	\$	\$	\$
Total Gap per Year		\$	\$	\$	\$	\$