

# Ready for retirement worksheet







### Determine if you have saved enough for a confident retirement

As you approach retirement, now is a good time to check whether your current plan has you covered. Our simple Ready for Retirement Worksheet will help you gain a better understanding of your finances and what they can do for you throughout your retirement.



#### A simple way to organize your finances

To help you compile the required information for this exercise, we have created the Ready for Retirement Worksheet.

- Just enter your information and this interactive worksheet will do all the calculations for you.
- If you can't provide the information in one sitting, simply save the Ready for Retirement Worksheet on your computer and come back to it whenever you like.
- You can also change your details any time and your data will be automatically recalculated.
- This is your private document and none of your details will be saved or shared by MetLife.



## These are the numbers that will determine the options available to you

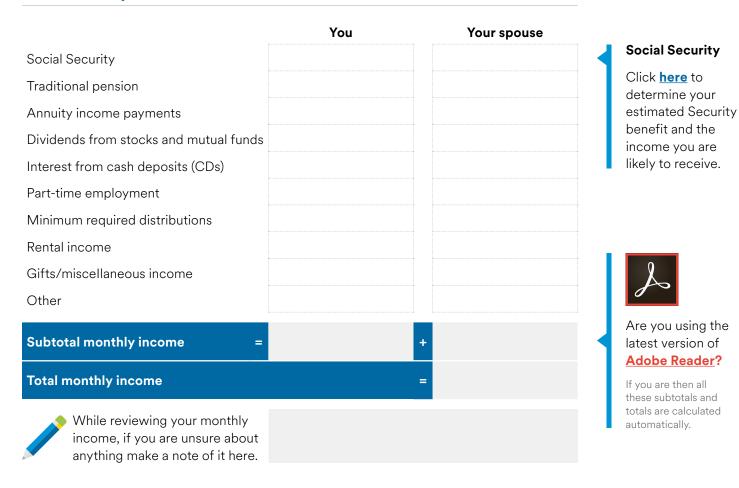
By better understanding your projected retirement income and future expenses, you'll then be in the position to determine whether or not there is an income gap to resolve.

Let's get started.



To make use of our interactive form, you'll need to download a recent version of Adobe Reader.

## Your monthly income



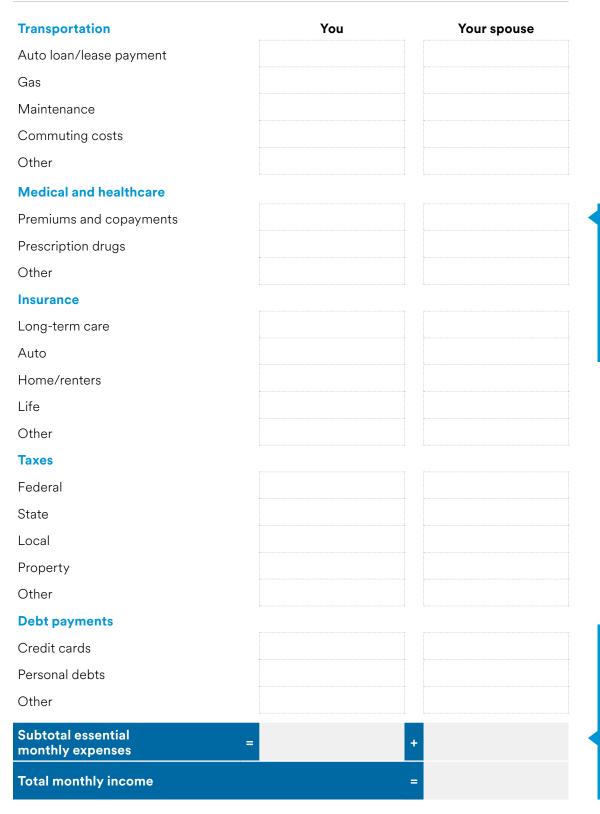
# Your essential monthly expenses

Housing	You	 Your spouse
Mortgage/rent		
Home equity loans		
Food		
Clothing and personal care		
Utilities		
Gas/electricity		
Telephone		
Cable TV		
Internet		
Other		



Remember to save your worksheet regularly so you don't lose your progress.

## Your essential monthly expenses (continued)





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# Medical and healthcare

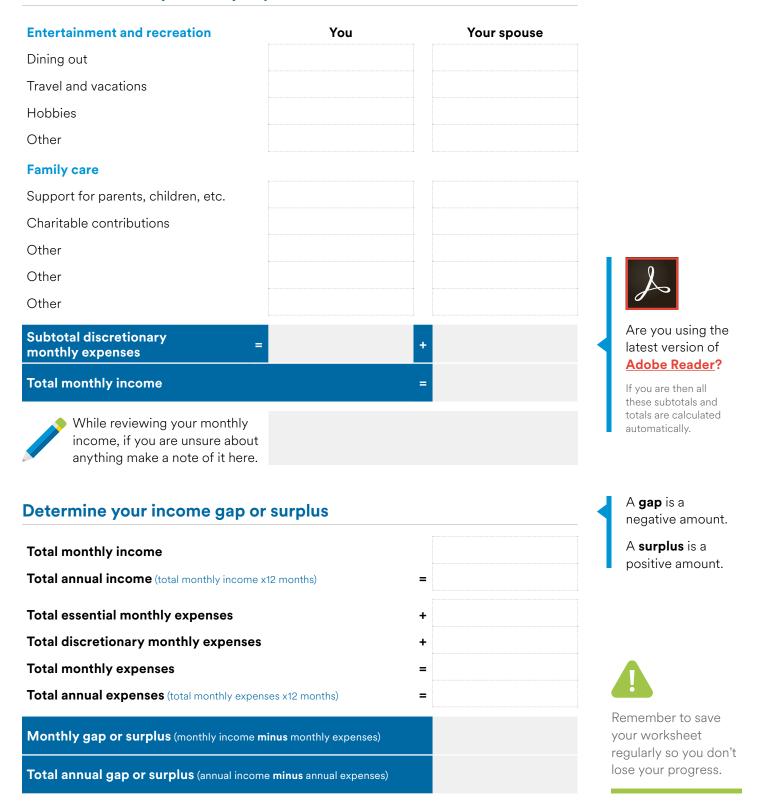
Call Medicare at 800-MEDICARE to determine how much of your medical expenses are likely to be covered.



Are you using the latest version of **Adobe Reader?** 

If you are then all these subtotals and totals are calculated automatically.

## Your discretionary monthly expenses



## **Assets and investments**

Retirement savings	You	Your spouse	
Workplace plans 401(k), 403(b), 457, etc.			Don't worry if
IRAs			it seems like
Roth IRAs			you're getting
Annuities			a late start. It's never too
Investments			late to make a
Stocks			difference in the
Bonds			quality of your
Mutual funds			retirement life.
Money market funds			
Other			
Bank accounts		<u>-</u>	
Savings/money market accounts			
Checking account			
Certificates of deposit			
Real estate			
Primary house equity			2
Other real estate equity			
Expected inheritances/gifts/settlements			Want to learn more?
Miscellaneous			Contact your HR department for more
Subtotal savings =		+	information about the guaranteed income options available in
Total savings		=	your retirement plan.

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