



CRA Simple Income Worksheet for Financial & Retirement Planning

Description	Monthly Income	Quarterly Income	Annual Income	Annual Income Amount in Retirement (if expected to be different)	
Income					
Wages - Client					
Wages - Spouse					
Social Security - Client					
Social Security - Spouse					
Pension					
Self-Employment					
Property Rental					
Interest					
Dividends					
Other Income					
Other Income					
Other Income					



CRA Simple Expense Worksheet for Financial & Retirement Planning

Description	Monthly Expenses	Quarterly Expense	Annual Expense	Annual Expense Amount in Retirement (if expected to be different)	Need or Want?
Home Expenses					
Mortgage Payment					
Extra Payment to Mortgage					
Property Taxes					
Home Owners Insurance					
Home Owner Association Dues					
Mortgage Insurance (if applicable)					
Food & Meals					
Groceries					
Eating Out					
Utilities/Telephone					
Gas/Electric					
Water/Trash					
Telephone(Land Line)					
Cell Phone					
Cable TV/Satellite TV					
Auto Operating & Maintenance					
Gasoline/Oil					
Repair/Maintenance					
Parking/Tolls					
Car Insurance					

