

YOUR RETIREMENT INCOME WORKSHEET

	FIRST NAME	LAST NAME
Client 1		
Client 2		

INCOME FROM GUARANTEED SOURCES

DESCRIPTION	DETAIL AMOUNT
GOVERNMENT BENEFITS	
CPP	
OAS	
Total Government Benefits	
ANNUITIES	
Total Annuities	
EMPLOYMENT PENSION	
Total Employment Pension	
TOTAL INCOME FROM GUARANTEED SOURCES	

INCOME FROM OTHER SOURCES

DESCRIPTION	DETAIL AMOUNT
NET EMPLOYMENT INCOME	
Total Net Employment Income	
INVESTMENT INCOME	
Total Investment Income	
RENTAL INCOME	
Total Rental Income	
TOTAL INCOME FROM OTHER SOURCES	
TOTAL INCOME FROM ALL SOURCES	