



Retirement Medicare Budget Planner

Plan Your Healthcare Expenses with Confidence



Use this planner to estimate your retirement income, Medicare expenses, and annual healthcare budget.

Monthly Retirement Income

Income Source	Monthly Amount
Social Security	\$ _____
Pension	\$ _____
Retirement Accounts	\$ _____
Employment	\$ _____
Other Income	\$ _____
Total Monthly Income	\$ _____

Monthly Healthcare Budget

Expense	Monthly Amount
Part B Premium	\$ _____
Medigap / Medicare Advantage	\$ _____
Part D Premium	\$ _____
Prescription Costs	\$ _____
Dental / Vision / Hearing	\$ _____
Other Healthcare	\$ _____
Total Healthcare Budget	\$ _____

Annual Planning Notes

Healthcare Savings Goal: _____

Expected Large Medical Expenses: _____

Questions for My Medicare Advisor: _____

Need Help Building Your Medicare Budget?

William Gray

The Medicare Dude™

Independent Medicare Broker Since 1998

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