



Gross Pay

Pre Tax Retirement
Contributions

Employer Contributions



Taxes

After Tax Savings and
Investments

1. Enter Your Estimated Gross Income
2. Enter Your Pre-Tax Retirement Contributions
3. If your Employer Contributes to your Retirement Account If applicable
4. Enter estimated total taxes paid (This includes Federal & State Local as well as FICA)
5. Enter After Tax Savings and Investments

Simplified Savings Rate

**This Resource is Part of our
Financial Independence A-Z Series**

[Check out our Podcast on
Savings Rate](#)

Advanced

Additional Income

1. Did You Earn Any Additional Income From a Side Hustle or Rental Real Estate?

Mortgage Principle Paid

2. How Much Principle did you pay down on Debt like Student Loans, Mortgage or Other Misc (Include Principle Only)

Tax Reconciliation (optional)

Tax Refund

Owed Taxes

3. Did You Owe Significant Taxes or Get a Large Tax Refund (Enter Your numbers in one or the other)

Your Personal Savings Rate