

人生後半戦の経済面を含めたライフプランニングシート

(ケース2 商社)

我が家の出来事

| 西暦 | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | 2034 | 2035 | 2036 | 2037 | 2038 | 2039 | 2040 | 2041 | 2042 | 2043 | 2044 | 2045 | 2046 | 2047 | 2048 | 2049 | 2050 | 2051 | 2052 | 2053 | 2054 | 2055 | | | | |
|----------|----|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|--|--|--|--|
| 年齢 | 本人 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 | 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | | | | |
| | 妻 | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 | 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | | | | |
| | 息子 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 | 54 | 55 | 56 | | | | |
| | 娘 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 | 54 | | | | |
| | 祖母 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 100 | 101 | 102 | 103 | 104 | 105 | 106 | 107 | 108 | 109 | 110 | 111 | | | | |
| 想定される出来事 | 本人 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 仕事 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 学習 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 余暇 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 家族 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 妻 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 子 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 親 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 住居 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 車 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| その他 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

家計の収支

| 西暦 | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | 2034 | 2035 | 2036 | 2037 | 2038 | 2039 | 2040 | 2041 | 2042 | 2043 | 2044 | 2045 | 2046 | 2047 | 2048 | 2049 | 2050 | 2051 | 2052 | 2053 | 2054 | 2055 | | |
|------|---------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|-----|--|
| 収入 | 本人 | 700 | 700 | 300 | 300 | 300 | 300 | 300 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | 180 | | |
| | 妻 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | | |
| | 年金 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 | |
| | その他 | | 2000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 収入合計 | 860 | 2860 | 460 | 460 | 460 | 460 | 460 | 340 | 340 | 340 | 340 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | 300 | |
| 支出 | 生活費 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | 240 | |
| | 住宅費 | 140 | 140 | 140 | 140 | 140 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 教育費(介護) | 60 | 60 | 60 | 60 | 60 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | |
| | その他 | 130 | 130 | 80 | 80 | 380 | 80 | 430 | 80 | 380 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 230 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | |
| 支出合計 | 570 | 570 | 520 | 520 | 820 | 420 | 770 | 420 | 720 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 570 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | 420 | | |
| 年間収支 | 290 | 2290 | -60 | -60 | -360 | 40 | -310 | -80 | -380 | -80 | -80 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -270 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | -120 | | |
| 貯蓄残高 | 1000 | 3290 | 3230 | 3170 | 2810 | 2850 | 2540 | 2460 | 2080 | 2000 | 1920 | 1800 | 1680 | 1560 | 1440 | 1320 | 1200 | 1080 | 960 | 840 | 720 | 450 | 330 | 210 | 90 | -30 | -150 | -270 | -390 | -510 | -630 | -750 | | | |