Plan Summary | Sell Cabin & Tom Retires age 62

The Plan Summary report lists high-level facts about a single plan, scenario, or Base Facts.

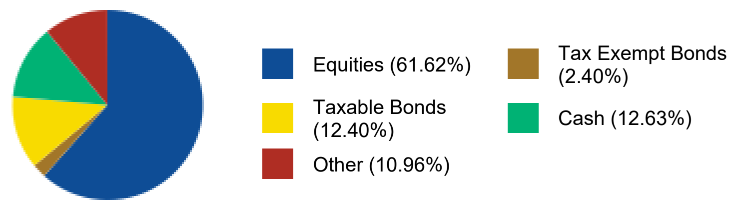
Probability of Success	Total Portfolio Assets Left	Age Assets Last Until
93%	**$5,710,729**	**— / 95**

Net Worth

Total Assets	$2,772,000
Total Liabilities	($72,500)
Net Worth	**$2,699,500**
Out of Estate	$66,000

Asset Allocation

Return:	**6.87%**
Risk:	**13.58%**
Total Value:	**$2,081,000**



Goals & Expenses

Name	Starts	Ends	Annual Amount	Probability of Success
Living Expenses				*93%*
Current	Active	When Example Client: Thomas is 58 (2026)	$111,391	-
Retirement	When Example Client: Thomas is 58 (2026)	When Example Client: Thomas is 95 (2063)	$101,975	-

Incomes

Income	Starts	Ends	Annual Amount
Salary - Tom	Active	Client's Retirement (age 58 in 2026)	$225,000
Part-Time Income for next 2 years	Client's Retirement (age 58 in 2026)	After 2 Years	$50,000
Salary - Ellen	Active	Spouse's Retirement (age 52 in 2023)	$55,000
Bonus - Tom	Active	Client's Retirement (age 58 in 2026)	$13,000
Example Client: Thomas's Social Security	At Full Retirement Age	-	$43,104
Ellen's Social Security	At Full Retirement Age	-	$23,604

Savings, Contributions and Transfers

Savings	Starts	Ends	Annual Amount
401(k) - Tom: Pre-Tax Contribution	Active	Client's Retirement (age 58 in 2026)	8.0% of salary
401(k) - Tom: Employer Contribution	Active	Client's Retirement (age 58 in 2026)	100.0% of the first 6.0% of employee's salary contributed
Brokerage Account - Joint: Annual Contribution	Active	Client's Retirement (age 58 in 2026)	$54,275 per year
IRA - Ellen: Pre-Tax Contribution	Year 2022	Year 2022	-
IRA - Ellen: Non-Roth Post-Tax Contribution	Year 2022	Spouse's Retirement (age 52 in 2023)	$1,750 per year
IRA - Tom: Pre-Tax Contribution	Year	Year 2022	-

	2022		
IRA - Tom: Non-Roth Post-Tax Contribution	Active	Client's Retirement (age 58 in 2026)	$6,000 per year
Checking - Joint: Transfer Flow	Active	After 7 Years	$10,000

INSURANCE

Insurance Type	Example Client: Thomas's Coverage	Ellen's Coverage
Life Insurance	$950,000	$62,000
Long Term Care Insurance	-	-
Disability Insurance	$142,800	$0