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 93%

Total Portfolio Assets Left \$5,710,729

Age Assets Last Until **—** / 95

NET WORTH

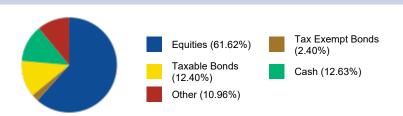
Out of Estate

INCOMES

Total Assets \$2,772,000 Total Liabilities **Net Worth**

(\$72,500)\$2,699,500 \$66,000 **ASSET ALLOCATION**

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



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 IRA - Tom: Pre-Tax Contribution	Year 2022 Year	Spouse's Retirement (age 52 in 2023) Year 2022	\$1,750 per year -				

This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/ representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.

2022 Active

IRA - Tom: Non-Roth Post-Tax Contribution

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				

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