



LIVE LONG AND PROSPER

A Monte Carlo simulation tool provides a means to test long term expected portfolio growth and portfolio survival based on withdrawals, e.g., testing whether the portfolio can sustain the planned withdrawals required for retirement.

In order to complete the simulation, we need to know the following recurring "gross" income (before taxes or anything else is deducted from the payment).

LIST MONTHLY AMOUNTS:	
Social Security #1	\$
Social Security #2	\$
Pension #1	\$
Pension #2	\$
Lifetime annuity payments	\$
Dividends	\$
Interest	\$
Business income	\$
Rental income	\$
Other	\$
TOTAL	\$

If you would like to do this on your own, below is a resource:

Reference: <https://www.portfoliovisualizer.com/monte-carlo-simulation>

To gain a better understanding of what these numbers mean, we suggest finding a financial advisor to help you through this exercise.

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