

HAVING CHOICES IN RETIREMENT REALLY MATTERS

CASH / BANK ASSETS

\$
\$
\$
\$

REAL ESTATE

Value	Mortgage Balance
\$	\$
\$	\$
\$	\$
\$	\$

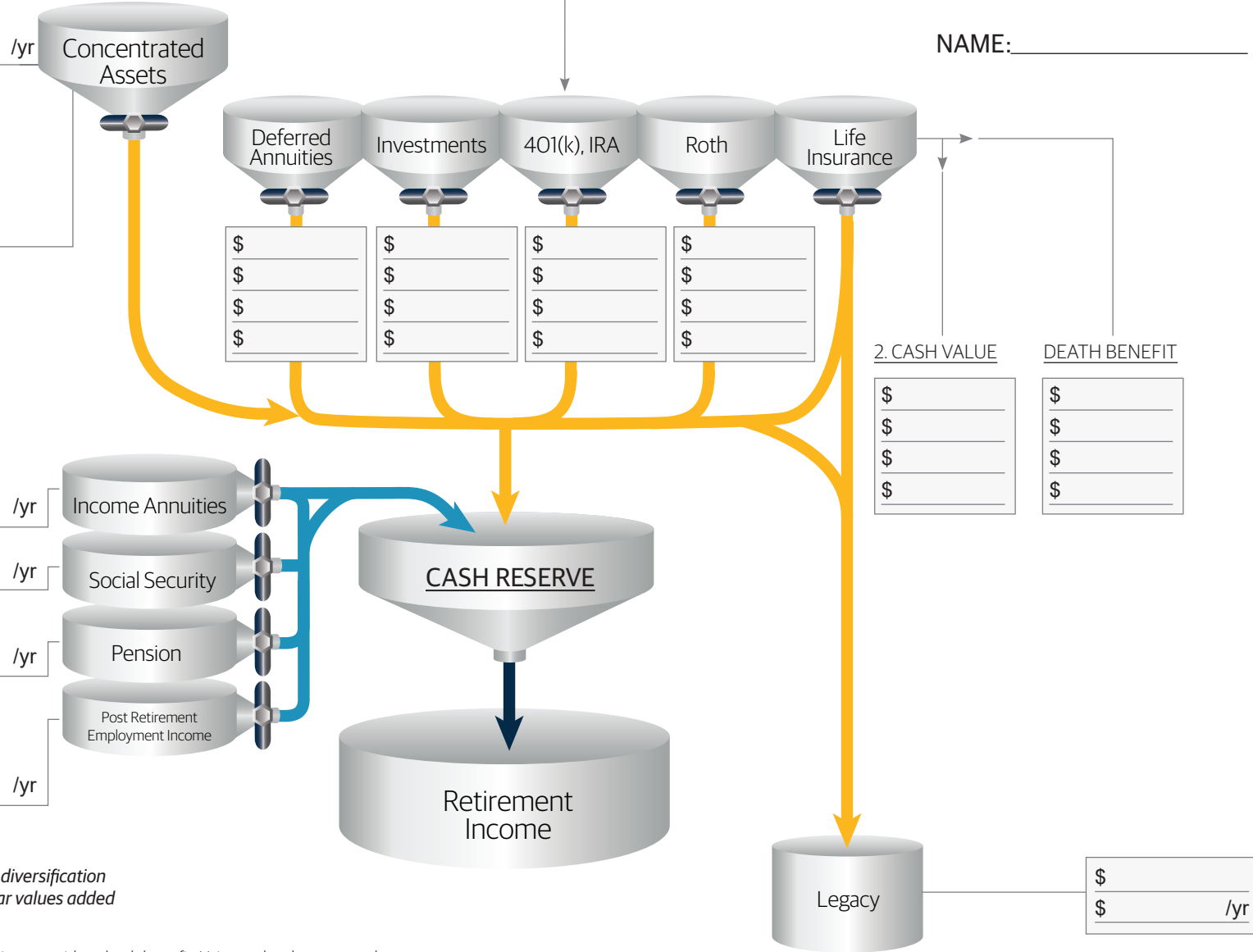
Current Employment Income

\$	/yr @
\$	/yr @

Income in Retirement

\$	/yr @
\$	/yr @
\$	/yr @
\$	/yr @
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\$	/yr @
\$	/yr @
\$	/yr @

INVESTMENTS, INSURANCE & INCOME FLEXIBILITY



This worksheet offers a high level view of the diversification of assets at a point in time. Approximate dollar values added to this worksheet are provided by the client.

The primary purpose of permanent life insurance is to provide a death benefit. Using cash values to supplement your retirement income will reduce benefits and may affect other aspects of your plan.

The graphic is hypothetical and intended to illustrate the concept of asset diversification. It is not intended and should not be used to represent any type of investment recommendation.

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