



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.

IntentGen Financial Partners often communicates with its clients and prospective clients through electronic mail (“email”) and other electronic means. Your privacy and security are very important to us. We make every effort to ensure that email communications do not contain sensitive information. We remind our clients and others not to send us private information over email. If you have sensitive data to deliver, we can provide secure means for such delivery. If you have received an email from us in error, we ask that you contact the sender and destroy the email and its contents.

Advisory Persons of Thrivent Advisor Network provide advisory services under a “doing business as” name or may have their own legal business entities. However, advisory services are engaged exclusively through Thrivent Advisor Network, LLC, a registered investment adviser. IntentGen Financial Partners and Thrivent Advisor Network, LLC are not affiliated companies.

Securities offered through Thrivent Investment Management Inc. (“TIMI”), member FINRA and SIPC, and a subsidiary of Thrivent, the marketing name for Thrivent Financial for Lutherans. [Thrivent.com/disclosures](https://www.thrivent.com/disclosures). TIMI and IntentGen Financial Partners are not affiliated companies.