Plan Summary | Base Facts

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

Probability of Success	46%

Total Portfolio Assets Left	($821,753)

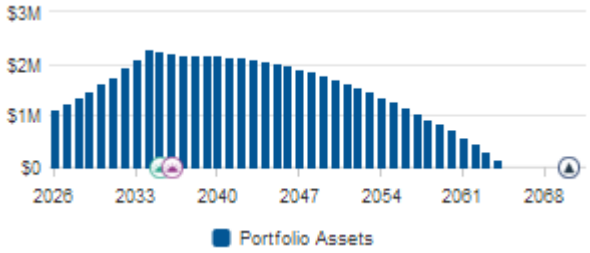
Age Assets Last Until	94 / 93

Goal Summary - Probability of Success

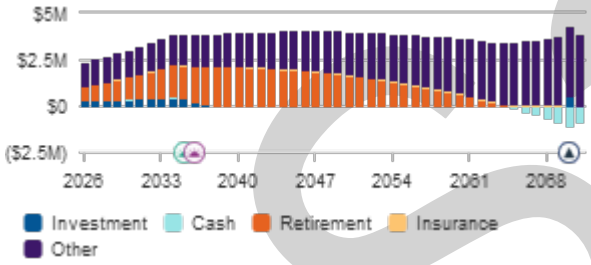


Retirement
46%

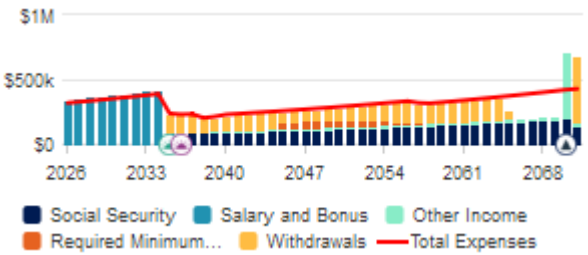
Lifetime Portfolio Value



Assets



Cash Flow Overview



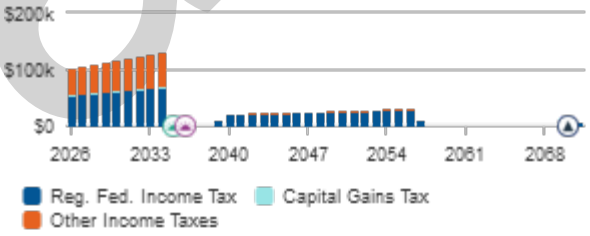
Current Annual Expenses



Living Expenses	72.07%
Mortgages	18.35%
Insurance Premiums	9.24%
Loans	0.35%

Total Annual Expenses: **$187,316**

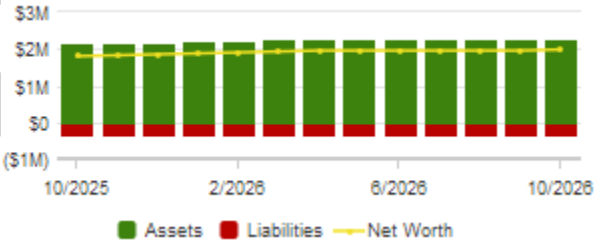
Income Taxes



Net Worth Summary

Total Assets	**$2,307,812**
Total Liabilities	**($329,643)**
Total Net Worth	**$1,978,169**
Out of Estate	—

Net Worth History



Action Items

- Upload tax return by October 20.
- Schedule appointment with estate attorney.
- Increase 401(k) contribution to 12% effective next pay period.

Sample

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.