

Foundational Planning – Provides a Probability of Success based upon Client’s Goals

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Traditional

OVERVIEW FACTS **PLANS** REPORTS VAULT 👤 ⚙️

FOUNDATIONAL PLANNING [Go to Presentation](#)

50%
Overall Probability of Success

Current Situation
(Client Facts)

Profile
Basic, Family, Friends and Income

Net Worth
Balance Sheet of Total Assets and Liabilities

Goals
Set Current Retirement, Education and Spending Plans

Additional Topics

76%
Overall Probability of Success

Proposed Retirement Plan #4 - September 2019
(Proposed Changes To Current Situation)

Planning
Adjust goals and apply techniques to your client's facts. When you're done creating new scenarios, you can select which one you'd like to move forward with and take action on.

[Go To Plans](#)

Advanced Planning – Provides Additional Planning Capabilities, including Goal Center, Decision Center and Report Driven Analysis


GOALPLANNER
Interactive Goal-Based Planning


DECISIONCENTER
Interactive Cash Flow Planning

Scenarios

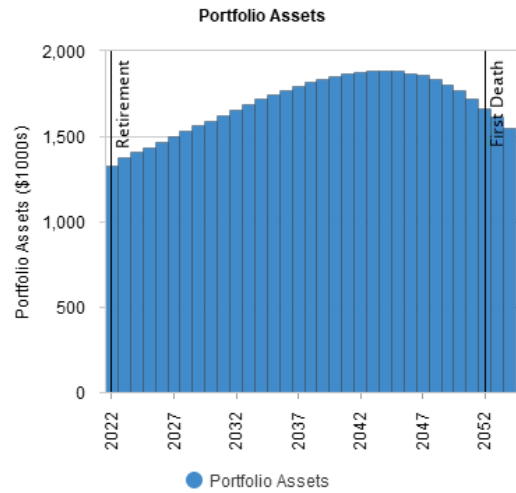
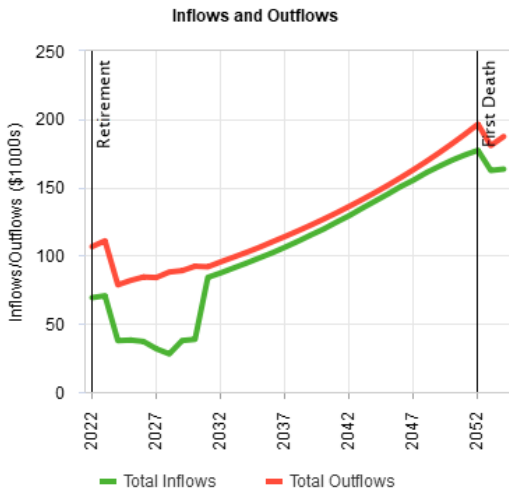
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[_Current Financial Scenario ▾](#)

Modified May 19, 2021

Based upon the levels of income and spending in the *_Current Financial Scenario*, your portfolio assets will last through at least 2054 (age 97/95).



Year	Age	Income Flows	Investment Income	Planned Distributions	Total Inflows	Total Expenses	Planned Savings	Total Outflows	Net Cash Flow	Total Portfolio Assets
2022	65/63	\$67,035	\$0	\$2,120	\$69,155	\$99,086	\$7,480	\$106,566	(\$37,411)	\$1,330,914
2023	66/64	68,285	0	2,260	70,545	103,266	7,550	110,816	(40,271)	1,377,410
2024	67/65	26,823	0	10,810	37,633	78,534	0	78,534	(40,901)	1,407,631
2025	68/66	27,091	0	10,970	38,061	81,799	0	81,799	(43,738)	1,437,174
2026	69/67	27,362	0	9,654	37,016	84,264	0	84,264	(47,248)	1,466,796
2027	70/68	27,636	0	3,998	31,634	83,908	0	83,908	(52,274)	1,499,319
2028	71/69	27,912	0	0	27,912	87,944	0	87,944	(60,032)	1,530,251
2029	72/70	28,191	0	9,537	37,728	88,938	0	88,938	(51,210)	1,562,278
2030	73/71	28,473	0	10,122	38,595	92,147	0	92,147	(53,552)	1,593,251
2031	74/72	28,758	0	55,257	84,015	91,758	0	91,758	(7,743)	1,626,699
2032	75/73	29,046	0	58,236	87,282	95,382	0	95,382	(8,100)	1,658,874
2033	76/74	29,337	0	61,555	90,892	98,824	0	98,824	(7,932)	1,689,884
2034	77/75	29,631	0	64,813	94,444	102,332	0	102,332	(7,888)	1,719,597
2035	78/76	29,928	0	68,304	98,232	105,994	0	105,994	(7,762)	1,747,787
2036	79/77	30,227	0	71,738	101,965	110,014	0	110,014	(8,049)	1,774,004
2037	80/78	30,529	0	75,596	106,125	113,965	0	113,965	(7,840)	1,798,203
2038	81/79	30,834	0	79,585	110,419	118,054	0	118,054	(7,635)	1,820,124
2039	82/80	31,142	0	83,879	115,021	122,277	0	122,277	(7,256)	1,839,501
2040	83/81	31,453	0	87,953	119,406	126,690	0	126,690	(7,284)	1,855,994
2041	84/82	31,767	0	92,707	124,474	131,281	0	131,281	(6,807)	1,869,253
2042	85/83	32,085	0	97,171	129,256	136,073	0	136,073	(6,817)	1,878,888
2043	86/84	32,406	0	102,287	134,693	141,027	0	141,027	(6,334)	1,884,518
2044	87/85	32,730	0	107,147	139,877	146,165	0	146,165	(6,288)	1,885,719
2045	88/86	33,057	0	112,013	145,070	151,538	0	151,538	(6,468)	1,881,990
2046	89/87	33,388	0	117,200	150,588	157,146	0	157,146	(6,558)	1,872,800
2047	90/88	33,722	0	121,621	155,343	163,002	0	163,002	(7,659)	1,857,572