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Retirement Map for Jane Doe

July 7th, 2017

INVESTMENT AMOUNT \$500,000	MONTHLY SAVINGS \$2,000	RETIREMENT YEAR 2032	MONTHLY WITHDRAWAL \$6,000	NEEDED BY RETIREMENT DATE
93% Probab	oility			
82				

Assumptions

2020

2025

Birth Year: 1967, Life Expectancy: 90, Inflation Rate: 2.0%, Annual Savings Increase: 0.0%

2030

Investment Amount is the starting principal amount in today's dollars. Monthly Savings is the amount of assumed monthly savings from today until the retirement date selected. The Retirement Year (past or present) is the date at which the monthly savings stop and monthly withdrawals start. All inputs and calculations are pre-tax. Your Monthly Withdrawal should be the amount, in today's dollars, needed after retirement, less any other income sources not included in the above analysis. The results are presented in today's dollars and adjusted for inflation at the rate you select. The assumed annual return for your selected Risk 82 is 8.5% (which is 6.5% after inflation). This excludes any annuity base rider increase. The chart displays a range of possible investment returns based on a 95% probability analysis.

2040

2045

2050

2055

2035

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