



RETIREMENT COMPASS

The Retirement Compass helps you chart your income planning destination. The report integrates multiple sources of income (including Social Security, pension and rental income) along with strategies to generate income from assets to help fulfill your goals throughout retirement.

Income Forecast

Beginning Portfolio Balance
\$1,000,000

Total Portfolio Withdrawals
\$1,595,321

Ending Portfolio Balance
\$1,058,041

Year (Age)	Employment	Social Security	Pension / Other	Portfolio	Total	Goal	+ / -	Portfolio Balance
2024 (66 / 62) *	\$30,000	\$16,800	\$27,000	\$51,200	\$125,000	\$125,000	\$0	\$997,113
2025 (67 / 63) *	30,000	16,968	27,270	52,012	126,250	126,250	0	993,358
2026 (68 / 64) *	30,000	17,138	27,543	52,832	127,513	127,513	0	988,690
2027 (69 / 65) *	30,000	17,309	27,818	53,660	128,788	128,788	0	983,064
2028 (70 / 66)	0	57,022	28,096	44,957	130,076	130,076	0	986,399
2029 (71 / 67)	0	57,592	28,377	45,407	131,376	131,376	0	989,536
2030 (72 / 68)	0	58,168	28,661	45,861	132,690	132,690	0	992,467
2031 (73 / 69)	0	58,750	28,948	46,319	134,017	134,017	0	985,161
2032 (74 / 70)	0	59,337	29,237	46,782	135,357	135,357	0	977,310
2033 (75 / 71)	0	59,931	29,530	47,250	136,711	136,711	0	968,898
2034 (76 / 72)	0	60,530	29,825	47,723	138,078	138,078	0	959,909
2035 (77 / 73)	0	61,135	30,123	48,200	139,459	139,459	0	950,326
2036 (78 / 74)	0	61,747	30,424	48,682	140,853	140,853	0	940,135
2037 (79 / 75)	0	62,364	30,729	49,169	142,262	142,262	0	933,415
2038 (80 / 76)	0	62,988	31,036	49,661	143,684	143,684	0	942,705
2039 (81 / 77)	0	63,618	31,346	50,157	145,121	145,121	0	951,968
2040 (82 / 78)	0	64,254	31,660	50,659	146,572	146,572	0	961,202
2041 (83 / 79)	0	64,897	31,976	51,165	148,038	148,038	0	970,275
2042 (84 / 80)	0	65,545	32,296	51,677	149,518	149,518	0	979,119
2043 (85 / 81)	0	66,201	32,619	52,194	151,014	151,014	0	987,710
2044 (86 / 82)	0	66,863	32,945	52,716	152,524	152,524	0	996,027
2045 (87 / 83)	0	67,532	33,275	53,243	154,049	154,049	0	1,004,045
2046 (88 / 84)	0	68,207	33,607	53,775	155,589	155,589	0	1,011,739
2047 (89 / 85)	0	68,889	33,943	54,313	157,145	157,145	0	1,019,082
2048 (90 / 86)	0	69,578	34,283	54,856	158,717	158,717	0	1,026,046
2049 (91 / 87)	0	70,274	34,626	55,405	160,304	160,304	0	1,032,599
2050 (92 / 88)	0	70,976	34,972	55,959	161,907	161,907	0	1,038,712
2051 (93 / 89)	0	71,686	35,322	56,518	163,526	163,526	0	1,044,349
2052 (94 / 90)	0	72,403	35,675	57,084	165,161	165,161	0	1,049,475
2053 (95 / 91)	0	73,127	36,032	57,654	166,813	166,813	0	1,054,052
2054 (96 / 92)	0	73,858	36,392	58,231	168,481	168,481	0	1,058,041
Totals:	\$120,000	\$1,825,688	\$975,584	\$1,595,321	\$4,516,593			

*This page is cash flow focused and does not include income from Roth Conversions.

SAMPLE REPORT

This illustration is for informational purposes only and is not intended to be a projection or prediction of current or future performance of any specific product. All financial products have an element of risk and may experience loss. Past performance is not indicative of future results.