

Big-picture

We focus on what really matters to give you the best chance of reaching your financial goals

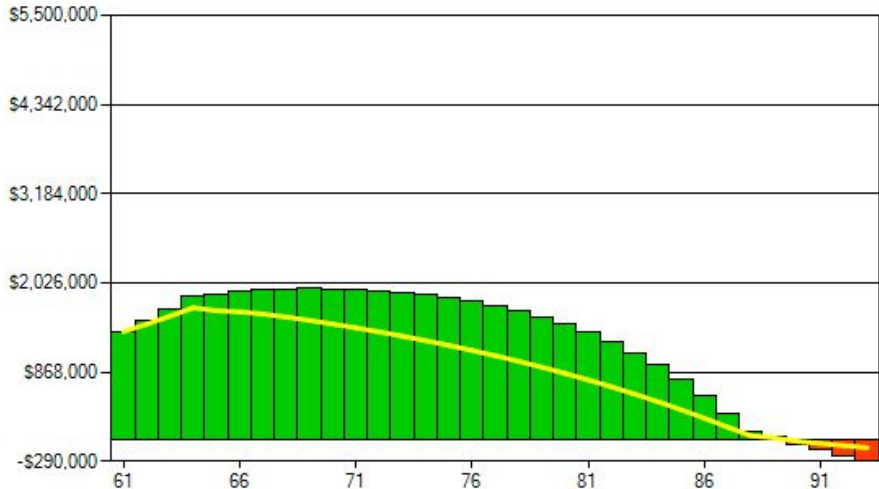
Interactive

Together, we evaluate various inputs and run “What-if” scenarios to compare potential outcomes

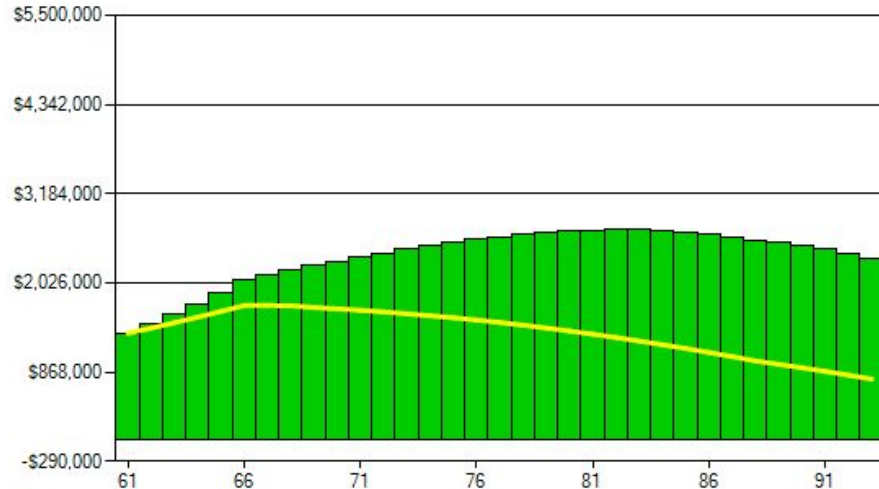
Straightforward

You receive clear, understandable recommendations and retirement projections, without all the fluff

Original Monte Carlo Simulation Result: 36%



What-if? Monte Carlo Simulation Result: 85%



Using What If? **Recalculate** What If? Report What If? Graph Monte Carlo Report Monte Carlo Area Rpt

Spending Needs		ROR	Taxed	Tx-Free	Tx-Def	Ann	Life Ex	Retire	SS	Pen1	Pen2	Life Ins.	
Ret.	100,000	Now	8 %	5 %	7 %	7 %	John	88	67	67	0	0	0
Surv.	80,000	Ret.	8 %	5 %	7 %	7 %	Mary	91	67	67	60	0	0
Inflation	Tax	Adds	IRA	Roth IRA	Roth401k	Q Plans	Inc %	SS Claiming Strategy					
Now	3.5 %	25 %	John	0	2,000	0	9,000	3 %	Scenario Text				
Ret.	3.5 %	20 %	Mary	0	2,000	0	0	3 %	Manual Start Age(s) ▼				
Surv.	3.5 %	Adds	Annuity	Tax-Free	Taxable		Inc%	Save/Report		Reset			
Std. Dev.	0 %		0	0	3,000		3 %	Load/Report					