Financial Fact Check
Paul & Chani

Personal Information

Your Name	Age	Retire Age	LE Age	Spouse Name	Age	Retire Age	LE Age
Paul	66	67	93	Chani	63	64	93

Child Name	Age	Child Name	Age
Leto II	32	Ghanima	32

Financial Assumptions

Inflation Rate	Filing Status	Deduction	Desired Lifestyle	Desired Legacy
3%	Married Filing Jointly	Standard	$15,000	$0

Future Inflation will be	Future Returns will be	Future Taxes will be	Last Beneficiary Review	Last Estate Plan Review
Same	Same	Same		

Earned Income, Defined Benefits and Future Inflow Sources

Name/Description	Owner	Amount	Inflate @	% Taxable	Deductible Amt	Start Age	End Age
Salary P	Client	$160,000	3%	100%	$0	66	66
Salary C	Spouse	$20,000	3%	100%	$0	63	63
SS P	Client	$49,740	1%	85%	$0	67	93
SS C	Spouse	$26,340	1%	85%	$0	64	93

Investments, Savings, and Other Future Lifestyle Sources

Name/Description	Owner	Type	Balance	Rate	Fee	Risk	Access	Contribution/Match	Start Age	End Age
Current 401k	Client	TDBT	$120,000	5%	0%	High	No	$9,600 / $4,800	66	66
Old 401k	Client	TDBT	$2,100,000	5%	0%	High	No	$0 / $0	66	66

Name/Description	Owner	Type	Balance	Rate	Fee	Risk	Access	Annual Contribution	Start Age	End Age
Etrade	Joint	Taxable	$7,000	5%	0%	High	Yes	$0	66	66
Banks	Joint	Taxable	$20,000	0%	0%	Low	Yes	$0	66	66

Mortgages, Installment Loans and Credit Lines

Name/Description	Owner	Type	Balance	Rate	Monthly P&I	Credit Line
Mortgage	Joint	Loan	$150,000	2.25%	$2,537.00	$0

Primary / Secondary Residence

Name/Description	Owner	Market Value	Appr. Rate	Cost Basis	CG Exception	Sell at Age
Residence	Joint	$395,000	3%	$350,000	$500,000	0

Itemized Expenses

Name/Description	Owner	Type	Annual Amount	Inflate @	Start Age	End Age
Base Lifestyle	Joint	Outflow	$100,000	3%	66	100

Summary Values

Assets	Liabilities	Net Worth	Liquidity	DB Protection	Lifestyle Lasts Until Age
$2,769,587	$910,840	$1,858,746	$27,350	$0	100

Disclosure

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The projections or other information generated by the calculator regarding the likelihood of various outcomes are hypothetical in nature, and are not guarantees of future results. Investment rates of return can not be guaranteed. This report is calculated using information supplied by you, the client. If any of this information is inaccurate, it would create inaccuracies in the report.