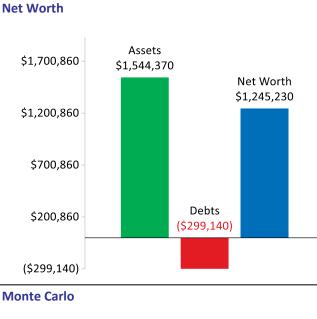
money**tree**

Summary for Allen & Betty Abbett

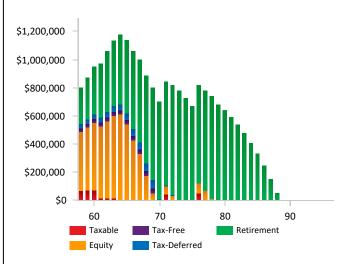


\$1,500,000 \$1,000,000 \$500,000 \$0 60 65 70 75 80 85 90 95 Percentage of results above zero 11%

Education

\$60,000 \$40,000 \$20,000 \$0

Account Summary



Retirement Analysis

| Available for Retirement Capital Projected to Last Until | \$800,990 Age 88 |
|---|---------------------|
| Retirement Need | |
| Projected Capital at Retirement | \$1,137,071 |
| Needed at Retirement | \$1,336,654 |
| Additional Needed by Retirement | \$199,583 |
| Solutions | |
| Reduce Retirement Spending by | \$7,000 / yr |
| Achieve Rate of Return of | 7.25% |
| | |

Action Items

This report is a customizable deliverable that allows advisors to produce a concise analysis for their clients on a single page.

- Include up to 6 modules on the report
- Save module sets to quickly load your favorite modules
- Enter custom messaging with the Action Items/Custom Text module

1/1/2018

This report, and its hypothetical illustrations, are intended to form a basis for further discussion with your legal, accounting, and financial advisors. Actual future investment returns, taxes and inflation are unknown. Do not rely upon this report to predict future investment performance.