Financial Planning Application

Annotated Report Guide for... Retirement Goal Progress Summary

Retirement Goal Progress Summary

Focusing on the basics of meeting goals, this report shows goal coverage based on current values versus where they should be tracking and the total differences between the two scenarios.



Assets Funding At Retirement

compares current values projected to goal start date for retirement assets versus where they should be and calculates the difference value between the two.

Difference = Where You Are Tracking as of Goal Start Date - Where You Should Be Tracking as of Goal Start Date



Retirement Goal Coverage Lists percent of goal covered currently versus where you should be tracking.



Plan Overview - Where You Are

Tracking lists assumptions of the plan based on current values.



Tracking lists assumptions of the plan based on where the current values should be to meet need.



How to Get Back On Track lists options

for both current plan and where the current plan should be in order to meet needs.

Retirement Goal Progress Summary

Are You On Track?

You are currently tracking to where you should be to achieve this goal. There may be opportunities to adjust your goal.

	Should Be racking as of al Start Date: \$833,210 (\$	ference: Where You Are Tracking - 100%	Where You Should Be Tracking - 100%
Plan Overview		Where You Are Tracking	Where You Should Be Tracking
Retirement	Mister/Madam	65 (2021) / 65 (2025)	65 (2021) / 65 (2025)
Life Expectancy	Mister/Madam	90 (2046) / 90 (2050)	90 (2046) / 90 (2050)
Inflation Rate		3.00%	3.009
1st Year Retirement Needs*		\$22,014	\$20,75
Pre-Retirement Rate of Return		4.30%	6.069
Retirement Rate of Return		4.30%	6.069
Assets Funding Retirement		\$150,260	\$157,02
Assets Funding at Ret	tirement	\$821,255	\$833,21
First Shortfall	Mister/Madam	-	
Total Net Worth at P	lan End	\$2,442,165	\$2,442,16
How To Get Back On Track		Progress Plan	Proposed Pla
Alter Spending		\$54,042	\$54,04
Save Monthly		\$0	\$
Save a Lump Sum		\$0	\$
Retire In	Mister/Madam	59 (2015) / 55 (2015)	59 (2015) / 55 (2015