

Summary View

Detailed View

Enter retirement plan information below.

Additional Inputs

Settings

Current Age	60
Retirement Age	68
Life Expectancy	92
Inflation - Average	3.5%
Inflation - Std Dev	1.0%
Investment Tax Rate	10%
Income Tax Rate	10%

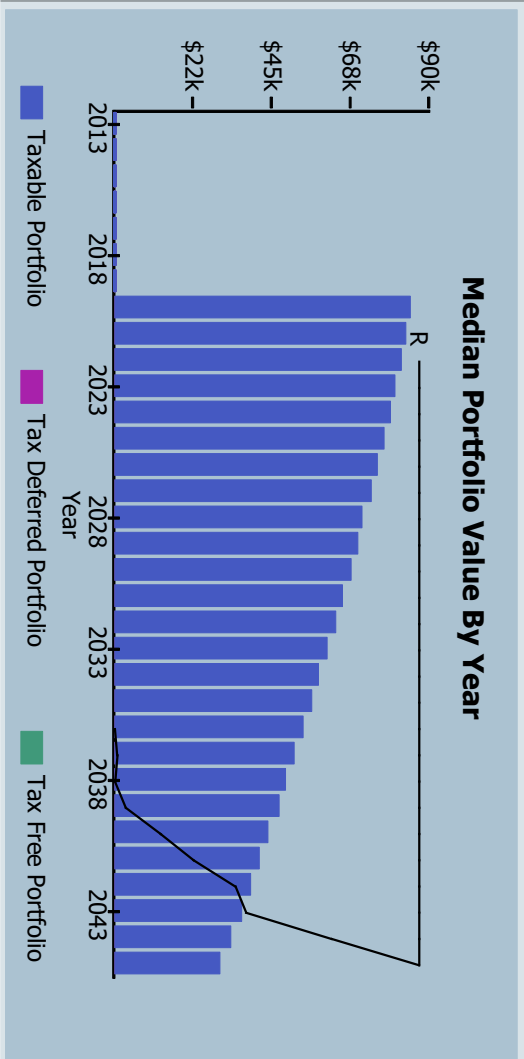
Taxable Portfolio Value	\$13,000
Tax Deferred Portfolio Value	\$180,000
Tax Free Portfolio Value	\$0
Min IRA/401k Withdrawal Age	67
Taxable Annual Savings	\$2,500
Tax Deferred Annual Savings	\$2,200
Tax Free Annual Savings	

Investing Style	Below Average Risk
(Stocks/Bonds/Int)	30% / 60% / 10%
Return - Average	7.0%
Return - Std Dev	7.1%
Annual Retirement Income	\$68,000
Retirement Income Start Age	68
Annual Retirement Spending	\$65,000
Spending Policy	Stable

Summary of retirement planner simulation results:

Sensitivity Analysis

Show All Runs



Graph Controls:

Show yearly results

Show % of expenses funded

Show failures (times money ran out)

Show portfolio value bands (10%-90%)



Probability of Success

90%

(Average Spending Shortfall: 11%)

Goal-Seek Portfolio Value: \$88,047
 Median Ending Portfolio Value: \$31,724
 Withdrawal Rate Range: **4.3%** - **10.9%**
 Initial Withdrawal: \$3,800 (4.3%)
 Percent of Expenses Funded: 100-100%
 Median Ending Withdrawal: \$3,800 (12.0%)