

Net Worth Outlook

Proposed Plan

This report shows changes in your net worth over time. These projected end-of-year values begin with the analysis year and end with death of the last surviving client. Furthermore, assets included in this report are categorized to show how changes in net worth occur. Use this report to assess your total net worth by asset category through the duration of the analysis.

Year & Age	Non-Qualified Assets	Qualified Assets	Lifestyle Assets	Real Estate Assets	Total Liabilities	Total Net Worth
2018 (65/70)	\$742,391	\$446,915	\$683,400	\$540,600	\$0	\$2,413,306
2019 (66/71)	\$679,007	\$460,620	\$697,068	\$551,412	\$0	\$2,388,107
2020 (67/72)	\$604,773	\$474,744	\$711,009	\$562,440	\$0	\$2,352,967
2021 (68/73)	\$525,294	\$489,300	\$725,230	\$573,689	\$0	\$2,313,512
2022 (69/74)	\$440,309	\$504,301	\$739,734	\$585,163	\$0	\$2,269,507
2023 (70/75)	\$401,270	\$502,719	\$754,529	\$596,866	\$0	\$2,255,384
2024 (71/76)	\$367,214	\$500,483	\$769,619	\$608,803	\$0	\$2,246,121
2025 (72/77)	\$330,905	\$497,564	\$785,012	\$620,979	\$0	\$2,234,461
2026 (73/78)	\$292,283	\$493,912	\$800,712	\$633,399	\$0	\$2,220,306
2027 (74/79)	\$250,892	\$489,495	\$816,726	\$646,067	\$0	\$2,203,180
2028 (75/80)	\$235,914	\$484,273	\$833,061	\$658,988	\$0	\$2,212,236
2029 (76/81)	\$218,960	\$478,201	\$849,722	\$672,168	\$0	\$2,219,051
2030 (77/82)	\$199,848	\$471,334	\$866,716	\$685,612	\$0	\$2,223,510
2031 (78/83)	\$178,529	\$463,533	\$884,051	\$699,324	\$0	\$2,225,436
2032 (79/84)	\$154,799	\$454,864	\$901,732	\$713,310	\$0	\$2,224,705
2033 (80/85)	\$128,508	\$445,312	\$919,766	\$727,576	\$0	\$2,221,163
2034 (81/86)	\$601,396	\$434,845	\$938,162	\$0	\$0	\$1,974,403
2035 (82/87)	\$562,994	\$423,433	\$956,925	\$0	\$0	\$1,943,352
2036 (83/88)	\$527,281	\$411,045	\$976,063	\$0	\$0	\$1,914,390
2037 (84/89)	\$488,184	\$397,654	\$995,585	\$0	\$0	\$1,881,423
2038 (85/90)	\$445,375	\$383,430	\$1,015,496	\$0	\$0	\$1,844,301
2039 (86/91)	\$445,561	\$368,369	\$1,035,806	\$0	\$0	\$1,849,736
2040 (87/92)	\$444,318	\$352,471	\$1,056,523	\$0	\$0	\$1,853,312
2041 (88/93)	\$441,529	\$335,741	\$1,077,653	\$0	\$0	\$1,854,923
2042 (89/94)	\$437,046	\$318,220	\$1,099,206	\$0	\$0	\$1,854,472
2043 (90/95)	\$430,494	\$300,160	\$1,121,190	\$0	\$0	\$1,851,845

Important: The calculations or other information generated by NaviPlan® version 17.2 regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. These calculations are shown for illustrative purposes only because they utilize return data that may not include fees or operating expenses, and are not available for investment. If included, fees and other operating expenses would materially reduce these calculations. NaviPlan® provides general analysis and planning with non-specific recommendation language that does not qualify as investment advice. Specific investment recommendations found on this deliverable are solely created by the advisor and may materially change the advisor-client fiduciary relationship, and thus should be reviewed between the interested parties.

Year & Age	Non-Qualified Assets	Qualified Assets	Lifestyle Assets	Real Estate Assets	Total Liabilities	Total Net Worth
2044 (91/-)	\$372,037	\$282,240	\$1,143,614	\$0	\$0	\$1,797,890
2045 (92/-)	\$308,539	\$263,820	\$1,166,486	\$0	\$0	\$1,738,846
2046 (93/-)	\$239,705	\$244,953	\$1,189,816	\$0	\$0	\$1,674,474
2047 (94/-)	\$165,001	\$226,005	\$1,213,612	\$0	\$0	\$1,604,618
2048 (95/-)	\$85,321	\$207,049	\$1,237,885	\$0	\$0	\$1,530,254

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