



# Income Provider™

Prepared for:

**Bob and Betty Gray**

February 28, 2002

Prepared by:

**Your Name Here**

Your Company Name Here

Your Street Address Here

Your City, State and Zip Address Here

(999) 999-9999



## Income Provider Scenario

### Prepared for: Bob and Betty Gray

#### Solving for: Investment Return

Age	Soc. Sec. Income	Pension Income	Other Income	Total Income	Desired Income	Shortfall/ Surplus	Investment Value
=====	=====	=====	=====	=====	=====	=====	=====
60	0	1,650	0	1,650	3,500	-1,850	285,320
60	0	18,150	0	18,150	38,500	-20,350	287,845
61	0	19,800	0	19,800	43,260	-23,460	289,528
62	0	19,800	0	19,800	44,558	-24,758	290,012
63	0	19,800	0	19,800	45,894	-26,094	289,149
64	0	19,800	0	19,800	47,271	-27,471	286,775
65	10,200	19,800	0	30,000	48,690	-18,690	293,326
66	10,404	19,800	0	30,204	50,150	-19,946	299,163
67	10,612	19,800	0	30,412	51,655	-21,243	304,180
68	10,824	19,800	0	30,624	53,204	-22,580	308,260
69	11,041	19,800	0	30,841	54,801	-23,960	311,274
70	11,262	19,800	0	31,062	56,445	-25,383	313,080
71	11,487	19,800	0	31,287	58,138	-26,851	313,521
72	11,717	19,800	0	31,517	59,882	-28,365	312,426
73	11,951	19,800	0	31,751	61,678	-29,927	309,606
74	12,190	19,800	0	31,990	63,529	-31,539	304,853
75	12,434	19,800	0	32,234	65,435	-33,201	297,938
76	12,682	19,800	0	32,482	67,398	-34,915	288,612
77	12,936	19,800	0	32,736	69,420	-36,683	276,600
78	13,195	19,800	0	32,995	71,502	-38,507	261,600
79	13,459	19,800	0	33,259	73,647	-40,389	243,282
80	13,728	19,800	0	33,528	75,857	-42,329	221,283
81	14,002	19,800	0	33,802	78,132	-44,330	195,206
82	14,283	19,800	0	34,083	80,476	-46,394	164,616
83	14,568	19,800	0	34,368	82,891	-48,522	129,036
84	14,859	19,800	0	34,659	85,377	-50,718	87,944
=====	=====	=====	=====	=====	=====	=====	=====
Totals	247,834	495,000	0	742,834	1,531,289	-788,455	87,944

All investments (except initial) and withdrawals treated as occurring at the end of the month.

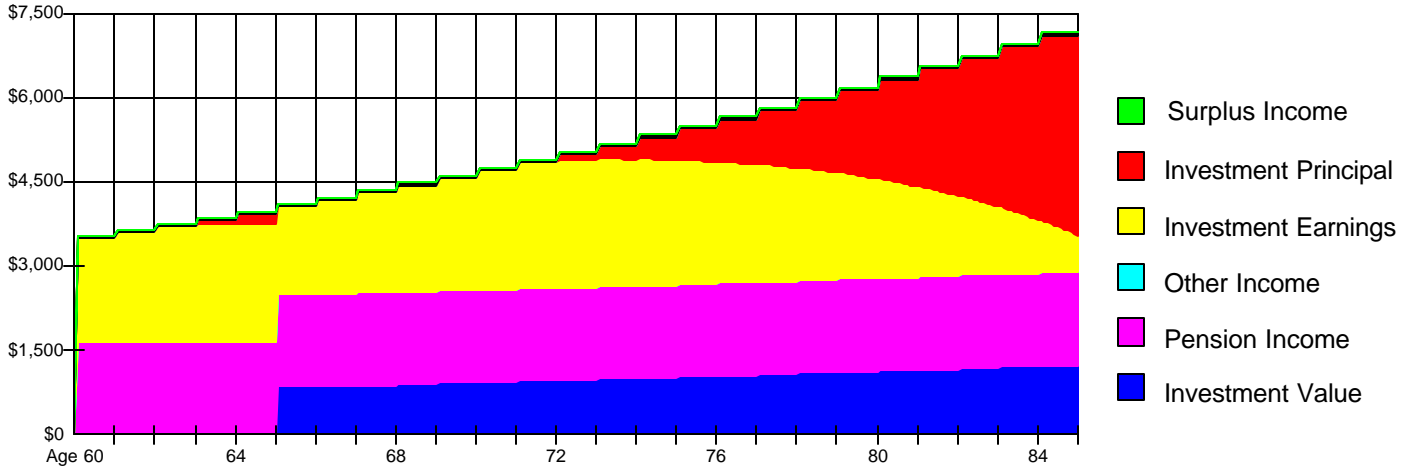
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# Income Provider Scenario

## Prepared for: Bob and Betty Gray

### Monthly Income



### Solving for: Investment Return

Income Period: 25 Years and 0 Months  
 Investment End Value: \$87,939  
 Investment Return: 9.07%

Income	Amount	Type	Delay
Monthly Income (Desired)	\$3,500	Inflating @ 3.00%	None
Social Security Income	\$850	Inflating @ 2.00%	5 Years and 0 Months
Pension Income	\$1,650	Level	None
Other Income	\$0	Level	None

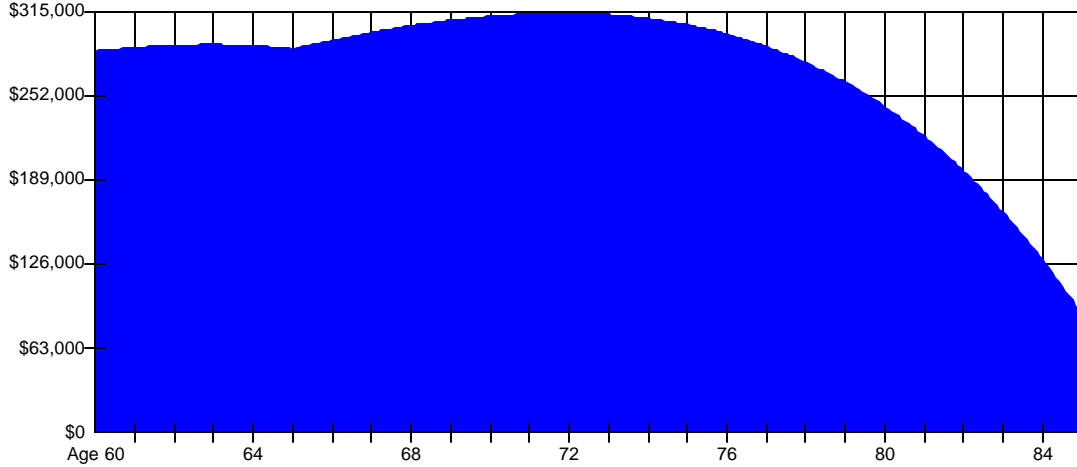
All investments (except initial) and withdrawals treated as occurring at the end of the month.



# Income Provider Scenario

## Prepared for: Bob and Betty Gray

### Investment Value



### Solving for: Investment Return

Income Period: 25 Years and 0 Months  
 Investment End Value: \$87,939  
 Investment Return: 9.07%

Income	Amount	Type	Delay
Monthly Income (Desired)	\$3,500	Inflating @ 3.00%	None
Social Security Income	\$850	Inflating @ 2.00%	5 Years and 0 Months
Pension Income	\$1,650	Level	None
Other Income	\$0	Level	None

All investments (except initial) and withdrawals treated as occurring at the end of the month.