





Monthly Income Plan

Based on your inputs and chosen assumptions, including an investment portfolio balance of \$2,650,000, your monthly planned Retirement Paycheck is \$15,177 (\$13,211 after taxes). These amounts may change over time. The plan reported on here includes a plan for income adjustments. The Adjustment Plan below shows estimates of when this plan would call for a change in income.

 Values shown in today's dollars. Income values are monthly and gross of tax and savings, but net of variable expenses.

Current Balance	Retirement Paycheck This month
 \$2,650,000	 \$15,177 <small>\$13,211 after taxes</small>

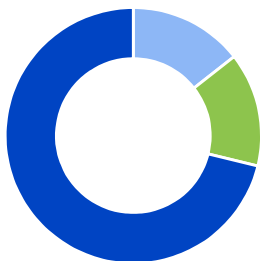
Income Adjustment Plan




Plan for Income Increase	Plan for Income Decrease
If balance reaches \$2,884,324  then increase income to \$16,519	If balance drops to \$1,964,522  then decrease income to \$14,418

If your portfolio balance were at or above \$2,884,324 (8.8% more than your current balance), your plan would call for a \$1,342 increase in income to \$16,519.

If your portfolio balance were at or below \$1,964,522 (25.9% less than your current balance), your plan would call for a \$759 decrease in income to \$14,418.

Income Analysis



Source	Amount	%
 Social Security	\$2,200	14.4%
 Other Income	\$2,200	14.4%
 Portfolio Withdrawals	\$10,877	71.2%
<i>Gross Income</i>	<i>\$15,277</i>	

Based on your inputs and chosen plan parameters, the chart above shows how much of this plan's first (or current) month of income comes from portfolio withdrawals, Social Security, and other sources.

IMPORTANT: The projections or other information generated by Income Lab regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results.