

Cash Flow | Base Facts (All Years) (Only Show Future Values)

The Cash Flow report illustrates your income, savings, expenses, and resulting net cash flow on an annual basis.

Cash Flow



Bob - Retirement / Mary - Retirement - 2028

Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2025	62/62	\$176,000	\$0	\$176,000	\$120,000	\$120,000	\$56,000	\$119,900	\$0	\$2,175,900
2026	63/63	\$180,200	\$0	\$180,200	\$124,800	\$124,800	\$55,400	\$127,087	\$0	\$2,358,387
2027	64/64	\$184,526	\$0	\$184,526	\$129,792	\$129,792	\$54,734	\$134,707	\$0	\$2,547,828
2028	65/65	\$36,000	\$0	\$36,000	\$134,984	\$134,984	(\$98,984)	\$142,783	\$0	\$2,591,627
2029	66/66	\$36,000	\$0	\$36,000	\$140,383	\$140,383	(\$104,383)	\$151,342	\$0	\$2,638,586
2030	67/67	\$83,518	\$0	\$83,518	\$145,998	\$145,998	(\$62,480)	\$158,183	\$0	\$2,734,289
2031	68/68	\$91,664	\$0	\$91,664	\$151,838	\$151,838	(\$60,174)	\$163,921	\$0	\$2,838,036
2032	69/69	\$93,056	\$0	\$93,056	\$157,912	\$157,912	(\$64,856)	\$170,141	\$0	\$2,943,321
2033	70/70	\$94,482	\$0	\$94,482	\$164,228	\$164,228	(\$69,746)	\$176,452	\$0	\$3,050,027
2034	71/71	\$95,944	\$0	\$95,944	\$170,797	\$170,797	(\$74,853)	\$182,849	\$0	\$3,158,023
2035	72/72	\$97,442	\$0	\$97,442	\$177,629	\$177,629	(\$80,187)	\$189,323	\$0	\$3,267,159
2036	73/73	\$98,978	\$0	\$98,978	\$184,734	\$184,734	(\$85,756)	\$195,866	\$0	\$3,377,269
2037	74/74	\$100,552	\$0	\$100,552	\$192,123	\$192,123	(\$91,571)	\$202,467	\$0	\$3,488,165
2038	75/75	\$102,166	\$69,321	\$171,487	\$199,808	\$199,808	(\$28,321)	\$209,115	(\$69,321)	\$3,599,638
2039	76/76	\$103,820	\$73,342	\$177,162	\$207,800	\$207,800	(\$30,638)	\$215,798	(\$73,342)	\$3,711,456
2040	77/77	\$105,516	\$77,252	\$182,768	\$216,112	\$216,112	(\$33,344)	\$222,501	(\$77,252)	\$3,823,361
2041	78/78	\$107,254	\$81,722	\$188,976	\$224,756	\$224,756	(\$35,780)	\$229,211	(\$81,722)	\$3,935,070
2042	79/79	\$109,036	\$86,442	\$195,478	\$233,746	\$233,746	(\$38,268)	\$235,908	(\$86,442)	\$4,046,268
2043	80/80	\$110,862	\$91,428	\$202,290	\$243,096	\$243,096	(\$40,806)	\$242,574	(\$91,428)	\$4,156,608

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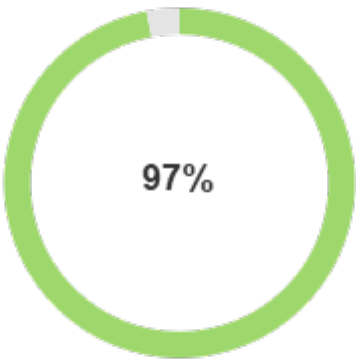
Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2044	81/81	\$112,734	\$96,192	\$208,926	\$252,820	\$252,820	(\$43,894)	\$249,190	(\$96,192)	\$4,265,712
2045	82/82	\$114,652	\$101,719	\$216,371	\$262,933	\$262,933	(\$46,562)	\$255,730	(\$101,719)	\$4,373,161
2046	83/83	\$116,618	\$106,944	\$223,562	\$273,450	\$273,450	(\$49,888)	\$262,170	(\$106,944)	\$4,478,499
2047	84/84	\$118,634	\$113,062	\$231,696	\$284,388	\$284,388	(\$52,692)	\$268,486	(\$113,062)	\$4,581,231
2048	85/85	\$120,700	\$118,766	\$239,466	\$295,764	\$295,764	(\$56,298)	\$274,645	(\$118,766)	\$4,680,812
2049	86/86	\$122,818	\$124,698	\$247,516	\$307,595	\$307,595	(\$60,079)	\$280,615	(\$124,698)	\$4,776,650
2050	87/87	\$124,988	\$130,857	\$255,845	\$319,899	\$319,899	(\$64,054)	\$286,360	(\$130,857)	\$4,868,099
2051	88/88	\$127,212	\$136,237	\$263,449	\$332,695	\$332,695	(\$69,246)	\$291,842	(\$136,237)	\$4,954,458
2052	89/89	\$129,492	\$142,798	\$272,290	\$346,003	\$346,003	(\$73,713)	\$297,020	(\$142,798)	\$5,034,967
2053	90/90	\$131,830	\$148,339	\$280,169	\$359,843	\$359,843	(\$79,674)	\$301,846	(\$148,339)	\$5,108,800

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Monte Carlo Summary | Base Facts (Only Show Future Values)

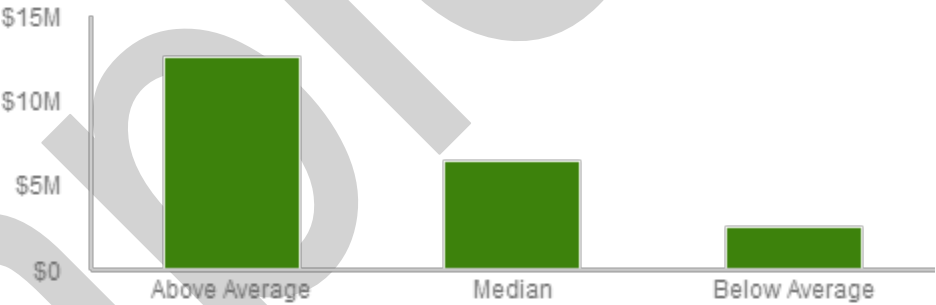
This Monte Carlo Analysis runs multiple simulations of your financial plan against future market conditions. The result of introducing random investment volatility to the analysis produces a range of values that demonstrates how changing investment markets may impact your future plans.

Probability Of Success



High	80% - 100%
Medium	66% - 79%
Low	0% - 65%

Portfolio Assets



Market Conditions	Percentile	Portfolio Assets
Above Average	80.0%	\$12,666,690
Median	50.0%	\$6,448,062
Below Average	20.0%	\$2,614,315

This Monte Carlo analysis illustrates the potential results of your financial plan using up to 1000 randomly generated market returns and volatility called trial runs. In each trial run, the mean and standard deviation of a selected benchmark index for each account or portfolio is used for a randomly chosen year. This hypothetical investment performance is combined with the detailed cash flow and tax calculations for your plan. The trial runs produce a range of potential results and are one way of illustrating and evaluating the statistical probability of your planning strategies.

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Cash Flow | Social Security Age 65 (All Years) (Only Show Future Values)

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Cash Flow



Bob - Retirement / Mary - Retirement - 2028

Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2025	62/62	\$176,000	\$0	\$176,000	\$120,000	\$120,000	\$56,000	\$119,900	\$0	\$2,175,900
2026	63/63	\$180,200	\$0	\$180,200	\$124,800	\$124,800	\$55,400	\$127,087	\$0	\$2,358,387
2027	64/64	\$184,526	\$0	\$184,526	\$129,792	\$129,792	\$54,734	\$134,707	\$0	\$2,547,828
 2028	65/65	\$80,368	\$0	\$80,368	\$134,984	\$134,984	(\$54,616)	\$142,783	\$0	\$2,635,995
2029	66/66	\$81,477	\$0	\$81,477	\$140,383	\$140,383	(\$58,906)	\$151,342	\$0	\$2,728,431
2030	67/67	\$82,614	\$0	\$82,614	\$145,998	\$145,998	(\$63,384)	\$160,415	\$0	\$2,825,462
2031	68/68	\$83,780	\$0	\$83,780	\$151,838	\$151,838	(\$68,058)	\$169,386	\$0	\$2,926,790
2032	69/69	\$84,974	\$0	\$84,974	\$157,912	\$157,912	(\$72,938)	\$175,462	\$0	\$3,029,314
2033	70/70	\$86,198	\$0	\$86,198	\$164,228	\$164,228	(\$78,030)	\$181,607	\$0	\$3,132,891
2034	71/71	\$87,453	\$0	\$87,453	\$170,797	\$170,797	(\$83,344)	\$187,817	\$0	\$3,237,364
2035	72/72	\$88,739	\$0	\$88,739	\$177,629	\$177,629	(\$88,890)	\$194,080	\$0	\$3,342,554
2036	73/73	\$90,057	\$0	\$90,057	\$184,734	\$184,734	(\$94,677)	\$200,386	\$0	\$3,448,263
2037	74/74	\$91,409	\$0	\$91,409	\$192,123	\$192,123	(\$100,714)	\$206,723	\$0	\$3,554,272
2038	75/75	\$92,794	\$69,321	\$162,115	\$199,808	\$199,808	(\$37,693)	\$213,078	(\$69,321)	\$3,660,336
2039	76/76	\$94,214	\$73,342	\$167,556	\$207,800	\$207,800	(\$40,244)	\$219,436	(\$73,342)	\$3,766,186
2040	77/77	\$95,669	\$77,252	\$172,921	\$216,112	\$216,112	(\$43,191)	\$225,782	(\$77,252)	\$3,871,525
2041	78/78	\$97,160	\$81,722	\$178,882	\$224,756	\$224,756	(\$45,874)	\$232,098	(\$81,722)	\$3,976,027
2042	79/79	\$98,689	\$86,442	\$185,131	\$233,746	\$233,746	(\$48,615)	\$238,363	(\$86,442)	\$4,079,333
2043	80/80	\$100,256	\$91,428	\$191,684	\$243,096	\$243,096	(\$51,412)	\$244,556	(\$91,428)	\$4,181,049

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Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2044	81/81	\$101,863	\$96,192	\$198,055	\$252,820	\$252,820	(\$54,765)	\$250,655	(\$96,192)	\$4,280,747
2045	82/82	\$103,510	\$101,719	\$205,229	\$262,933	\$262,933	(\$57,704)	\$256,631	(\$101,719)	\$4,377,955
2046	83/83	\$105,198	\$106,944	\$212,142	\$273,450	\$273,450	(\$61,308)	\$262,458	(\$106,944)	\$4,472,161
2047	84/84	\$106,928	\$113,062	\$219,990	\$284,388	\$284,388	(\$64,398)	\$268,105	(\$113,062)	\$4,562,806
2048	85/85	\$108,702	\$118,766	\$227,468	\$295,764	\$295,764	(\$68,296)	\$273,540	(\$118,766)	\$4,649,284
2049	86/86	\$110,520	\$124,698	\$235,218	\$307,595	\$307,595	(\$72,377)	\$278,724	(\$124,698)	\$4,730,933
2050	87/87	\$112,383	\$130,857	\$243,240	\$319,899	\$319,899	(\$76,659)	\$283,620	(\$130,857)	\$4,807,037
2051	88/88	\$114,293	\$136,237	\$250,530	\$332,695	\$332,695	(\$82,165)	\$288,182	(\$136,237)	\$4,876,817
2052	89/89	\$116,250	\$142,798	\$259,048	\$346,003	\$346,003	(\$86,955)	\$292,365	(\$142,798)	\$4,939,429
2053	90/90	\$118,256	\$148,339	\$266,595	\$359,843	\$359,843	(\$93,248)	\$296,119	(\$148,339)	\$4,993,961

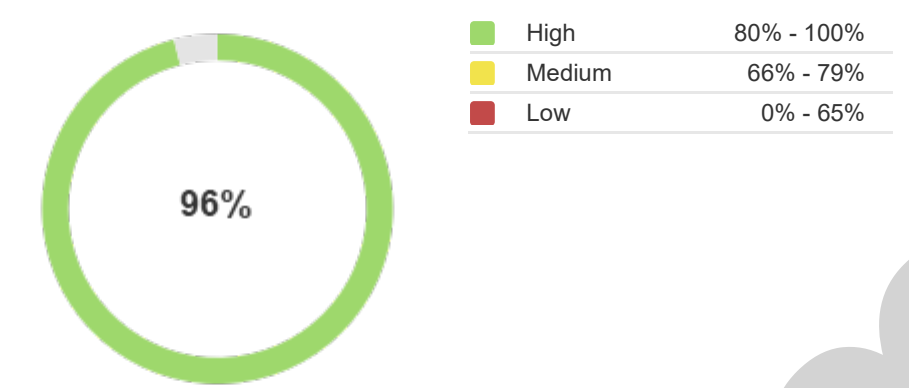
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Monte Carlo Summary | Social Security Age 65 (Only Show Future Values)

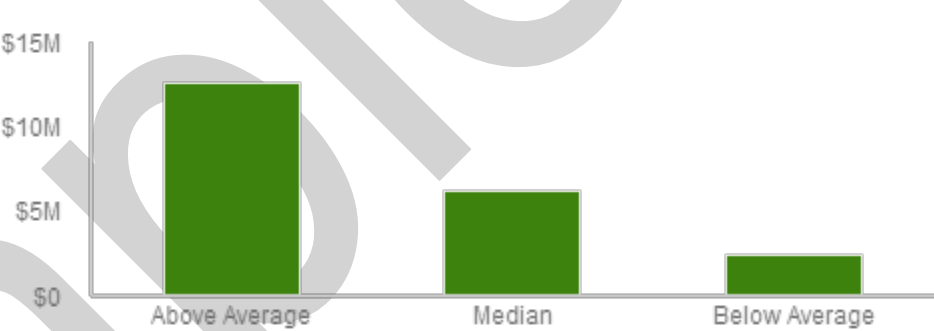
EKS ASSOCIATES
Fee-Only Comprehensive Financial Life Planning

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Probability Of Success



Portfolio Assets



Market Conditions	Percentile	Portfolio Assets
Above Average	80.0%	\$12,675,845
Median	50.0%	\$6,298,000
Below Average	20.0%	\$2,453,317

This Monte Carlo analysis illustrates the potential results of your financial plan using up to 1000 randomly generated market returns and volatility called trial runs. In each trial run, the mean and standard deviation of a selected benchmark index for each account or portfolio is used for a randomly chosen year. This hypothetical investment performance is combined with the detailed cash flow and tax calculations for your plan. The trial runs produce a range of potential results and are one way of illustrating and evaluating the statistical probability of your planning strategies.

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Cash Flow | Soc Security Age 70 (All Years) (Only Show Future Values)

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Cash Flow

 Bob - Retirement / Mary - Retirement - 2028

Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2025	62/62	\$176,000	\$0	\$176,000	\$120,000	\$120,000	\$56,000	\$119,900	\$0	\$2,175,900
2026	63/63	\$180,200	\$0	\$180,200	\$124,800	\$124,800	\$55,400	\$127,087	\$0	\$2,358,387
2027	64/64	\$184,526	\$0	\$184,526	\$129,792	\$129,792	\$54,734	\$134,707	\$0	\$2,547,828
 2028	65/65	\$36,000	\$0	\$36,000	\$134,984	\$134,984	(\$98,984)	\$142,783	\$0	\$2,591,627
2029	66/66	\$36,000	\$0	\$36,000	\$140,383	\$140,383	(\$104,383)	\$151,342	\$0	\$2,638,586
2030	67/67	\$36,000	\$0	\$36,000	\$145,998	\$145,998	(\$109,998)	\$158,183	\$0	\$2,686,771
2031	68/68	\$36,000	\$0	\$36,000	\$151,838	\$151,838	(\$115,838)	\$161,072	\$0	\$2,732,005
2032	69/69	\$36,000	\$0	\$36,000	\$157,912	\$157,912	(\$121,912)	\$163,785	\$0	\$2,773,878
2033	70/70	\$99,455	\$0	\$99,455	\$164,228	\$164,228	(\$64,773)	\$166,294	\$0	\$2,875,399
2034	71/71	\$110,334	\$0	\$110,334	\$170,797	\$170,797	(\$60,463)	\$172,380	\$0	\$2,987,316
2035	72/72	\$112,192	\$0	\$112,192	\$177,629	\$177,629	(\$65,437)	\$179,089	\$0	\$3,100,968
2036	73/73	\$114,096	\$0	\$114,096	\$184,734	\$184,734	(\$70,638)	\$185,903	\$0	\$3,216,233
2037	74/74	\$116,048	\$0	\$116,048	\$192,123	\$192,123	(\$76,075)	\$192,813	\$0	\$3,332,971
2038	75/75	\$118,050	\$69,321	\$187,371	\$199,808	\$199,808	(\$12,437)	\$199,811	(\$69,321)	\$3,451,024
2039	76/76	\$120,102	\$73,342	\$193,444	\$207,800	\$207,800	(\$14,356)	\$206,889	(\$73,342)	\$3,570,215
2040	77/77	\$122,204	\$77,252	\$199,456	\$216,112	\$216,112	(\$16,656)	\$214,033	(\$77,252)	\$3,690,340
2041	78/78	\$124,360	\$81,722	\$206,082	\$224,756	\$224,756	(\$18,674)	\$221,236	(\$81,722)	\$3,811,180
2042	79/79	\$126,570	\$86,442	\$213,012	\$233,746	\$233,746	(\$20,734)	\$228,480	(\$86,442)	\$3,932,484
2043	80/80	\$128,834	\$91,428	\$220,262	\$243,096	\$243,096	(\$22,834)	\$235,753	(\$91,428)	\$4,053,975

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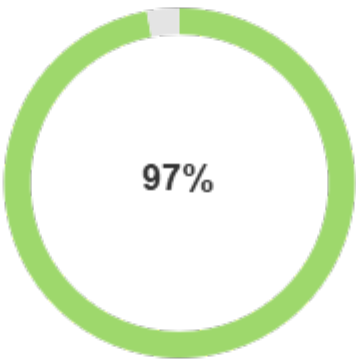
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2045	82/82	\$133,532	\$101,719	\$235,251	\$262,933	\$262,933	(\$27,682)	\$250,313	(\$101,719)	\$4,296,257
2046	83/83	\$135,970	\$106,944	\$242,914	\$273,450	\$273,450	(\$30,536)	\$257,560	(\$106,944)	\$4,416,337
2047	84/84	\$138,470	\$113,062	\$251,532	\$284,388	\$284,388	(\$32,856)	\$264,759	(\$113,062)	\$4,535,178
2048	85/85	\$141,032	\$118,766	\$259,798	\$295,764	\$295,764	(\$35,966)	\$271,884	(\$118,766)	\$4,652,330
2049	86/86	\$143,658	\$124,698	\$268,356	\$307,595	\$307,595	(\$39,239)	\$278,907	(\$124,698)	\$4,767,300
2050	87/87	\$146,350	\$130,857	\$277,207	\$319,899	\$319,899	(\$42,692)	\$285,800	(\$130,857)	\$4,879,551
2051	88/88	\$149,108	\$136,237	\$285,345	\$332,695	\$332,695	(\$47,350)	\$292,529	(\$136,237)	\$4,988,493
2052	89/89	\$151,936	\$142,798	\$294,734	\$346,003	\$346,003	(\$51,269)	\$299,060	(\$142,798)	\$5,093,486
2053	90/90	\$154,834	\$148,339	\$303,173	\$359,843	\$359,843	(\$56,670)	\$305,354	(\$148,339)	\$5,193,831

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Monte Carlo Summary | Soc Security Age 70 (Only Show Future Values)

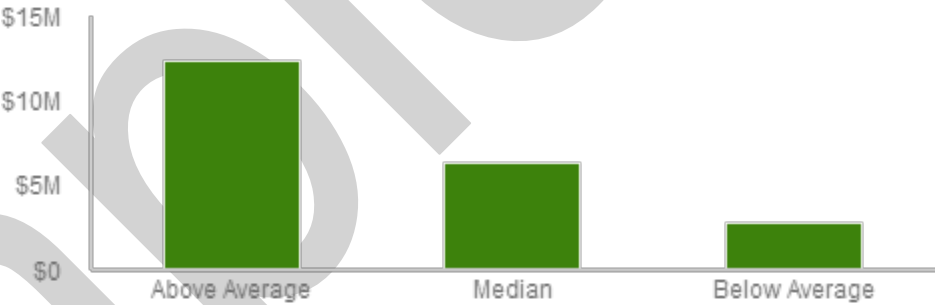
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Probability Of Success



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Low	0% - 65%

Portfolio Assets



Market Conditions	Percentile	Portfolio Assets
Above Average	80.0%	\$12,437,046
Median	50.0%	\$6,415,481
Below Average	20.0%	\$2,793,642

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Cash Flow | Soc Security Age 70 - Life Expectancy 100 (All Years) (Only Show Future Values)

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Cash Flow

 Bob - Retirement / Mary - Retirement - 2028

Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2025	62/62	\$176,000	\$0	\$176,000	\$120,000	\$120,000	\$56,000	\$119,900	\$0	\$2,175,900
2026	63/63	\$180,200	\$0	\$180,200	\$124,800	\$124,800	\$55,400	\$127,087	\$0	\$2,358,387
2027	64/64	\$184,526	\$0	\$184,526	\$129,792	\$129,792	\$54,734	\$134,707	\$0	\$2,547,828
 2028	65/65	\$36,000	\$0	\$36,000	\$134,984	\$134,984	(\$98,984)	\$142,783	\$0	\$2,591,627
2029	66/66	\$36,000	\$0	\$36,000	\$140,383	\$140,383	(\$104,383)	\$151,342	\$0	\$2,638,586
2030	67/67	\$36,000	\$0	\$36,000	\$145,998	\$145,998	(\$109,998)	\$158,183	\$0	\$2,686,771
2031	68/68	\$36,000	\$0	\$36,000	\$151,838	\$151,838	(\$115,838)	\$161,072	\$0	\$2,732,005
2032	69/69	\$36,000	\$0	\$36,000	\$157,912	\$157,912	(\$121,912)	\$163,785	\$0	\$2,773,878
2033	70/70	\$99,455	\$0	\$99,455	\$164,228	\$164,228	(\$64,773)	\$166,294	\$0	\$2,875,399
2034	71/71	\$110,334	\$0	\$110,334	\$170,797	\$170,797	(\$60,463)	\$172,380	\$0	\$2,987,316
2035	72/72	\$112,192	\$0	\$112,192	\$177,629	\$177,629	(\$65,437)	\$179,089	\$0	\$3,100,968
2036	73/73	\$114,096	\$0	\$114,096	\$184,734	\$184,734	(\$70,638)	\$185,903	\$0	\$3,216,233
2037	74/74	\$116,048	\$0	\$116,048	\$192,123	\$192,123	(\$76,075)	\$192,813	\$0	\$3,332,971
2038	75/75	\$118,050	\$69,321	\$187,371	\$199,808	\$199,808	(\$12,437)	\$199,811	(\$69,321)	\$3,451,024
2039	76/76	\$120,102	\$73,342	\$193,444	\$207,800	\$207,800	(\$14,356)	\$206,889	(\$73,342)	\$3,570,215
2040	77/77	\$122,204	\$77,252	\$199,456	\$216,112	\$216,112	(\$16,656)	\$214,033	(\$77,252)	\$3,690,340
2041	78/78	\$124,360	\$81,722	\$206,082	\$224,756	\$224,756	(\$18,674)	\$221,236	(\$81,722)	\$3,811,180
2042	79/79	\$126,570	\$86,442	\$213,012	\$233,746	\$233,746	(\$20,734)	\$228,480	(\$86,442)	\$3,932,484

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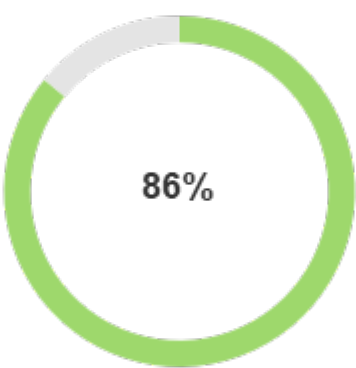
Year	Age	Income Flows	Planned Distributions	Total Inflows	Total Expenses	Total Outflows	Net Cash Flow	Portfolio Growth	Other Portfolio Activity	Total Portfolio Assets
2043	80/80	\$128,834	\$91,428	\$220,262	\$243,096	\$243,096	(\$22,834)	\$235,753	(\$91,428)	\$4,053,975
2044	81/81	\$131,154	\$96,192	\$227,346	\$252,820	\$252,820	(\$25,474)	\$243,036	(\$96,192)	\$4,175,345
2045	82/82	\$133,532	\$101,719	\$235,251	\$262,933	\$262,933	(\$27,682)	\$250,313	(\$101,719)	\$4,296,257
2046	83/83	\$135,970	\$106,944	\$242,914	\$273,450	\$273,450	(\$30,536)	\$257,560	(\$106,944)	\$4,416,337
2047	84/84	\$138,470	\$113,062	\$251,532	\$284,388	\$284,388	(\$32,856)	\$264,759	(\$113,062)	\$4,535,178
2048	85/85	\$141,032	\$118,766	\$259,798	\$295,764	\$295,764	(\$35,966)	\$271,884	(\$118,766)	\$4,652,330
2049	86/86	\$143,658	\$124,698	\$268,356	\$307,595	\$307,595	(\$39,239)	\$278,907	(\$124,698)	\$4,767,300
2050	87/87	\$146,350	\$130,857	\$277,207	\$319,899	\$319,899	(\$42,692)	\$285,800	(\$130,857)	\$4,879,551
2051	88/88	\$149,108	\$136,237	\$285,345	\$332,695	\$332,695	(\$47,350)	\$292,529	(\$136,237)	\$4,988,493
2052	89/89	\$151,936	\$142,798	\$294,734	\$346,003	\$346,003	(\$51,269)	\$299,060	(\$142,798)	\$5,093,486
2053	90/90	\$154,834	\$148,339	\$303,173	\$359,843	\$359,843	(\$56,670)	\$305,354	(\$148,339)	\$5,193,831
2054	91/91	\$157,804	\$153,904	\$311,708	\$374,237	\$374,237	(\$62,529)	\$311,371	(\$153,904)	\$5,288,769
2055	92/92	\$160,850	\$159,453	\$320,303	\$389,206	\$389,206	(\$68,903)	\$317,061	(\$159,453)	\$5,377,474
2056	93/93	\$163,972	\$164,938	\$328,910	\$404,774	\$404,774	(\$75,864)	\$322,380	(\$164,938)	\$5,459,052
2057	94/94	\$167,172	\$168,506	\$335,678	\$420,965	\$420,965	(\$85,287)	\$327,270	(\$168,506)	\$5,532,529
2058	95/95	\$170,452	\$171,716	\$342,168	\$437,804	\$437,804	(\$95,636)	\$331,675	(\$171,716)	\$5,596,852
2059	96/96	\$173,814	\$172,402	\$346,216	\$455,316	\$455,316	(\$109,100)	\$335,531	(\$172,402)	\$5,650,881
2060	97/97	\$177,260	\$174,691	\$351,951	\$473,529	\$473,529	(\$121,578)	\$338,770	(\$174,691)	\$5,693,382
2061	98/98	\$180,792	\$173,916	\$354,708	\$492,470	\$492,470	(\$137,762)	\$341,318	(\$173,916)	\$5,723,022
2062	99/99	\$184,412	\$172,321	\$356,733	\$512,169	\$512,169	(\$155,436)	\$343,094	(\$172,321)	\$5,738,359
2063	100/100	\$188,122	\$167,143	\$355,265	\$532,656	\$532,656	(\$177,391)	\$344,015	(\$167,143)	\$5,737,840

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Monte Carlo Summary | Soc Security Age 70 - Life Expectancy 100 (Only Show Future Values)

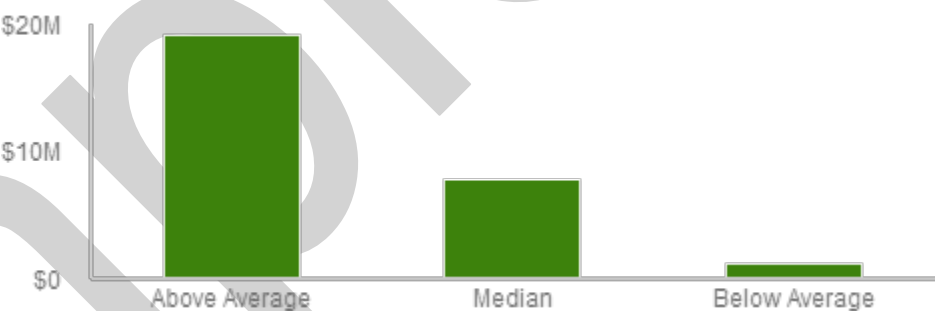
This Monte Carlo Analysis runs multiple simulations of your financial plan against future market conditions. The result of introducing random investment volatility to the analysis produces a range of values that demonstrates how changing investment markets may impact your future plans.

Probability Of Success



High	80% - 100%
Medium	66% - 79%
Low	0% - 65%

Portfolio Assets



Market Conditions	Percentile	Portfolio Assets
Above Average	80.0%	\$19,140,366
Median	50.0%	\$7,882,615
Below Average	20.0%	\$1,255,762

This Monte Carlo analysis illustrates the potential results of your financial plan using up to 1000 randomly generated market returns and volatility called trial runs. In each trial run, the mean and standard deviation of a selected benchmark index for each account or portfolio is used for a randomly chosen year. This hypothetical investment performance is combined with the detailed cash flow and tax calculations for your plan. The trial runs produce a range of potential results and are one way of illustrating and evaluating the statistical probability of your planning strategies.

IMPORTANT: The projections generated by this Monte Carlo simulation regarding the likelihood of various investment outcomes do not reflect or guarantee future results and may vary with each use and over time. Calculations are based upon market index and growth rate assumptions in your plan. Refer to the Assumptions Summary and Monte Carlo Assumptions reports for details.

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