

# Lamar Watson

One Page Plan  
May 3, 2023



## GOALS

- 1. Retire by age 65
- 2. Spend \$10,000 on travel annually.
- 3. Buy my first home in 5 years.



CURRENT ANNUAL INCOME  
**\$250,000**

ESTIMATED ANNUAL SPENDING  
**\$60,000**

|                         |                          |                            |                      |
|-------------------------|--------------------------|----------------------------|----------------------|
| Er 98 %<br>Equity Rate  | Ir 7 %<br>Insurance Rate |                            |                      |
| Sr 52 %<br>Savings Rate | Br 24 %<br>Burn Rate     | Dr 0 %<br>Debt Rate        | Tr 24 %<br>Tax Rate  |
| Lt 4.3<br>Liquid Term   | Qt 5.2<br>Qualified Term | Rt 0.0<br>Real Estate Term | Tt 9.6<br>Total Term |



This tool is only intended to illustrate mathematical principles and is not intended to portray investment performance of any particular product or strategy. If you have any questions regarding tax related issues, you should consult a qualified tax professional.

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