



## **Sample Plan Summary Snapshot**

Prepared for **Mr. Sample Client and Mrs. Sample Spouse**

### **Prepared By**

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# Plan Summary | Base Facts



The Plan Summary report lists high-level facts about a single plan, scenario, or Base Facts.

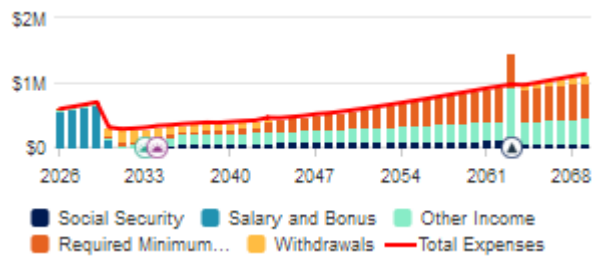
Probability of Success	99%	Total Portfolio Assets Left	\$16,978,388	Age Assets Last Until	— / 100	Confidence Age	— / 100
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## Probability of Success

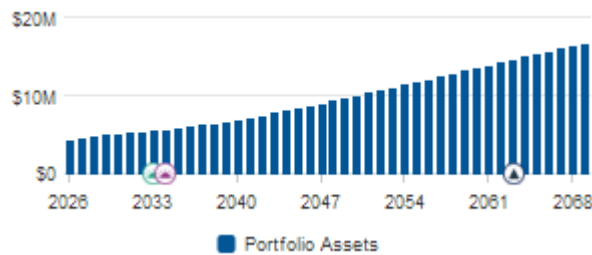


High	82% - 100%
Medium	70% - 81%
Low	0% - 69%

## Cash Flow Overview



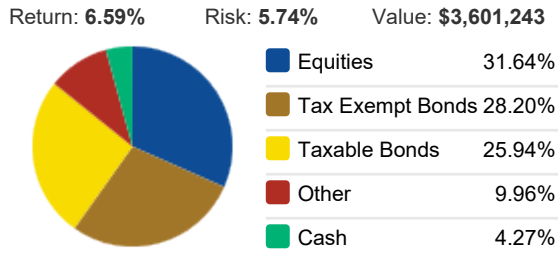
## Lifetime Portfolio Value



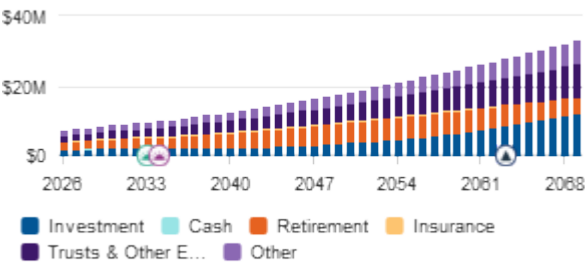
## Net Worth Summary

Total Assets	\$7,036,245
Total Liabilities	(\$300,000)
Total Net Worth	\$6,736,245
Out of Estate	—

## Asset Allocation



## Assets



## Goal Summary - Probability of Success



Retirement  
99%



Additional Travel...  
100%



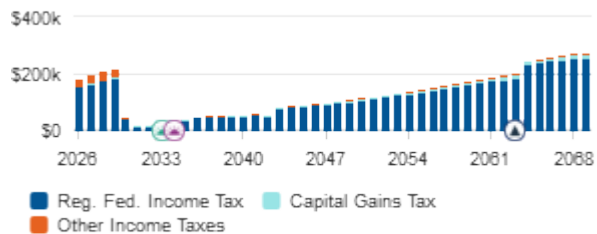
Home Remodel  
(Porch)  
100%

## Assets by Tax Type



Taxable	43.81%
Tax-Deferred	47.61%
Tax-Free	8.59%

## Income Taxes



This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.

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