Interactive Cash-Flow Planning

THE DECISION CENTER

Planning for the future can feel like an overwhelming concept – but with financial advice and technology backing your decisions, it doesn't have to be.

C+ Mome Clients Connections Analytics Application	tions = More = 🌲 😋		Settings H	Hp Sign Out	0
Frank and Joanna Miller 🗸		OVERVIEW FACTS	PLANS REPORTS VAUL		
			Got	Presentation	
Selected Plan Delay retirement and Soc Security *	Selected Report				
TECHNIQUES Modify			Vewin	Present Value O	
Sel Vacation House 2017 for \$275,000	SIM				
Retire 3 Years Later - Age 68/67	SOM		illine.		
Sell Vacation House 2017 for \$350,000				la la	
Special Vacations until 75 \$30,000					
Fin Support for Moms \$60,000 x 8 Years	•• • • • • • • • • • • • • • • • • • •				
Reduce Soc Sec by 33%					
Reduce Prop Tax and Maint. \$15,000	TODAY			AGE 100	
Growth Rates	ASSETS LAST UNTIL	FUNDING GAINED	VALUE GAINED		
At On - At Off	Age 100	0 Years	O \$4,159,02	7	
ADVANCED TECHNIQUES Advanced	Details by Year: 2065		<u>2</u> 77000	A 100	
C Delay Retrement			Portfolio Assets	Net Worth	
C Downsize Home	BEFORE		\$575,369	\$3,483,274	
Frank's Earnings	ATER		\$4,734,396	\$7,642,301	
C Living Expenses	NET		Q \$4,159,027	O \$4,159,027	
Retirement/Death Assumptions					
C Roth IRA Rollover					

PRIORITIZE YOUR GOALS

We'll work together to evaluate your goals and create a custom plan focused on helping you reach them. And because life is always changing, your plan should be dynamic as well.

SEE FUTURE PROJECTIONS

You'll be able to see the projected impact of your financial decisions on your goals in real-time so you can visualize how each piece of your financial puzzle fits together.

SIMULATE MULTIPLE SCENARIOS

We'll explore what-if scenarios to help you understand how potential changes may impact your goals, giving you the insight you need to make more informed decisions about your financial future.

Visualize your financial plan with our interactive Decision Center.