## *e*Money

# YOUR PERSONAL FINANCIAL WEBSITE

See a personalized story of your estate with the Decision Center.

DECISIONCENTER										 Go to Pr	resentation
Selected Plan Base Facts		Selected Repor		Viewing Estate Flo	ow Charts 🔻	Simulation Y As of Too					
TECHNIQUES	Modify	Net Worth	Frank's De	ath Survivo	or Income Joa	nna's Death	Overview				
Fin Support for Moms \$60,000 x 8 Years Retire 3 Years Later - Age 68/67										Futu	re Value 🔻
		IN ESTATE								OUT	OF ESTAT
Sell Vacation House 2021 for \$350,000 Sell Vacation House 2021 for \$275,000			Joanna's Net ' \$1,010,5			Frank* <b>\$2,11</b>	s Estate   <b>6,774</b>		Heirs		\$164,649
Reduce Prop Tax and Maint. \$15,000							ł				
Special Vacations until 75 \$30,000					Taxes	and Expenses		(\$50,000)			
Reduce Soc Sec by 33%					Inherit	ance	S	2,066,774			
	All On 1 All Off						ł				
ADVANCED TECHNIQUES	Advanced				Joanna's Estate \$3,077,295						
No techniques added						•	ł				
					Taxes	and Expenses	(	\$374,303)			
					Heirs		\$	2,702,992			

#### **Review Options Together**

We'll assess the risks and benefits of estate planning scenarios and work with you to better protect your legacy and your tax liability.

### **See Real-Time Projections**

Make live adjustments to your estate plan to project the possible impact of your financial decisions.

#### **Visualize Your Estate Plan**

See the effects of multiple estate planning techniques, like trusts or charitable giving.

With the interactive Decision Center, you can be sure you're taking care of the people and organizations that matter most, in the most tax-efficient manner.