

Comparison of Plans

For: Simon Scott & Ann Scott



Presented By: _____

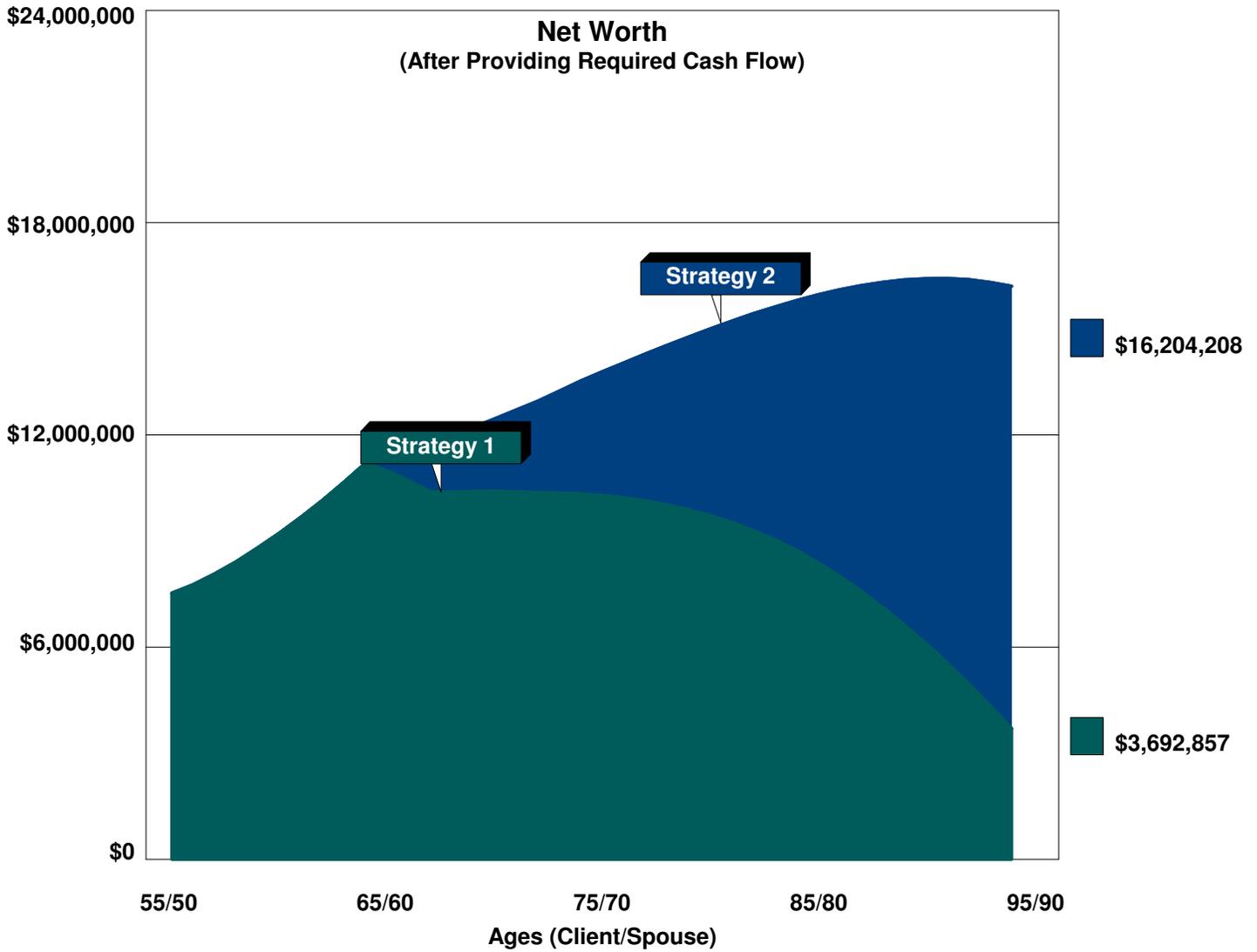
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Sample Financial Analysis - Test 1: Strategy 1 v. Strategy 2

Presented By: [Licensed User's name appears here]

For: Simon Scott & Ann Scott

Comparison of Alternatives



At Year 40

Strategy 1: Bad Logic \$3,692,857

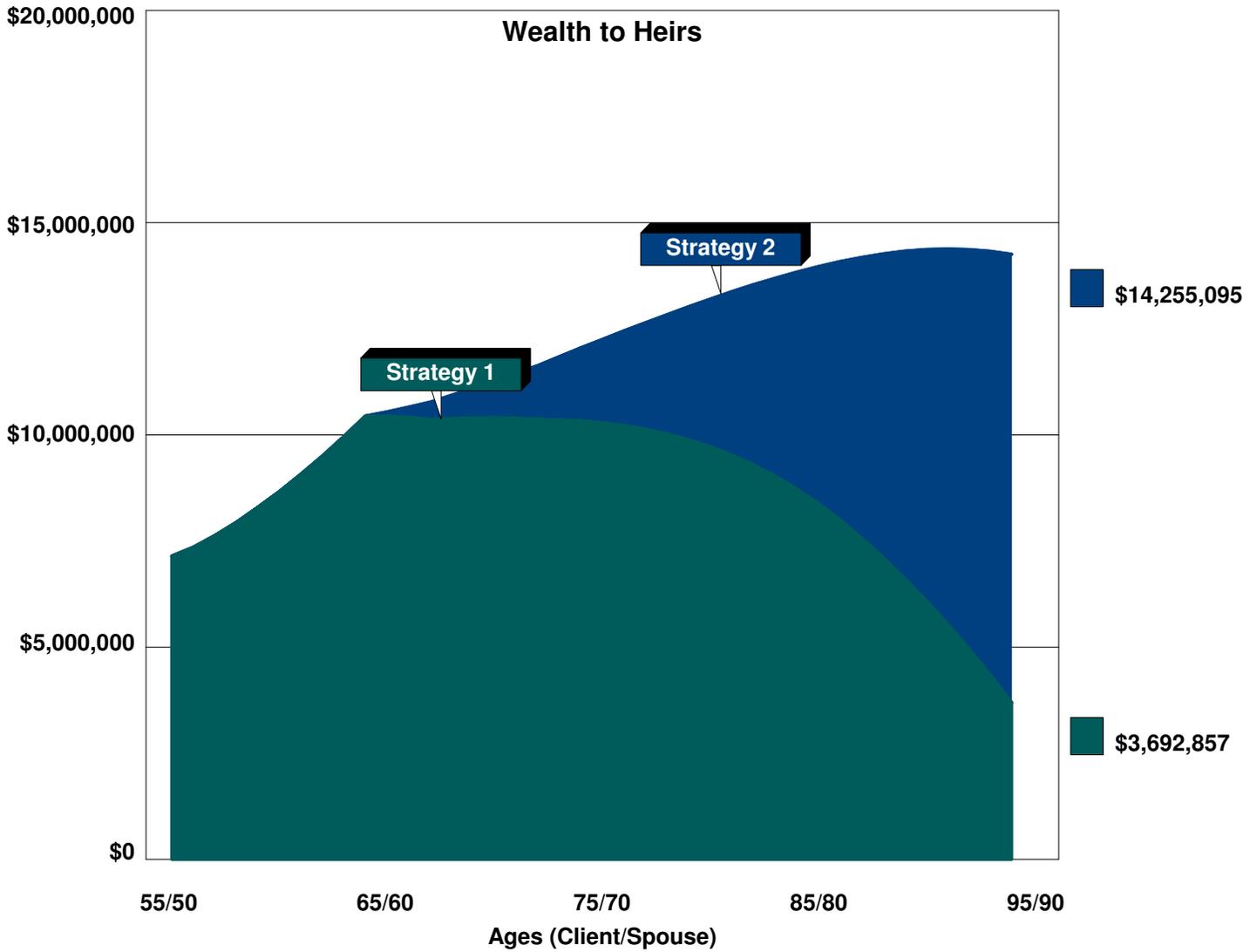
Strategy 2: Good Logic \$16,204,208

Sample Financial Analysis - Test 1: Strategy 1 v. Strategy 2

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Comparison of Alternatives



At Year 40

Strategy 1: Bad Logic \$3,692,857

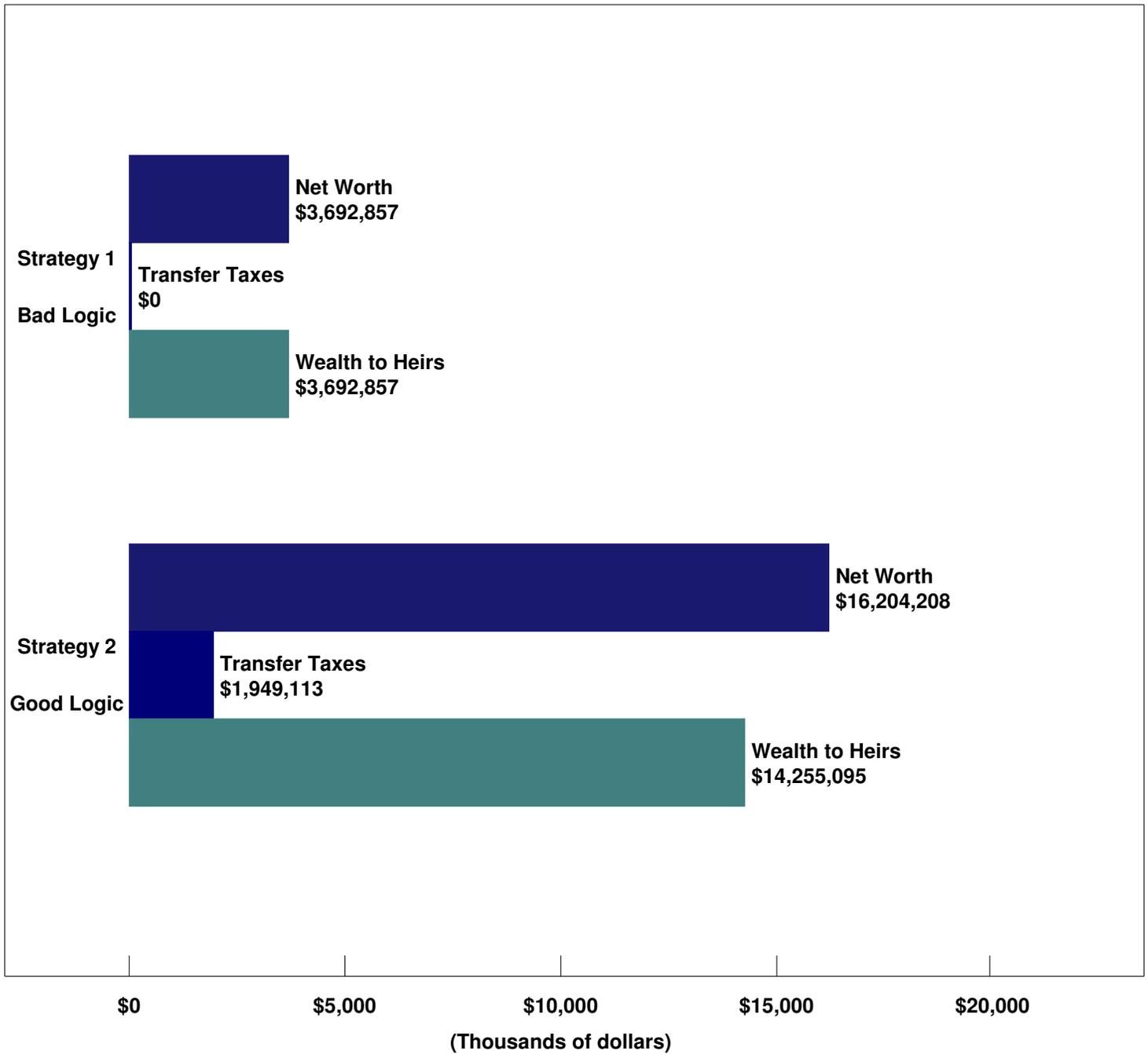
Strategy 2: Good Logic \$14,255,095

Sample Financial Analysis - Test 1: Strategy 1 v. Strategy 2

Presented By: [Licensed User's name appears here]

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Comparison of Alternatives at Ages 94/89



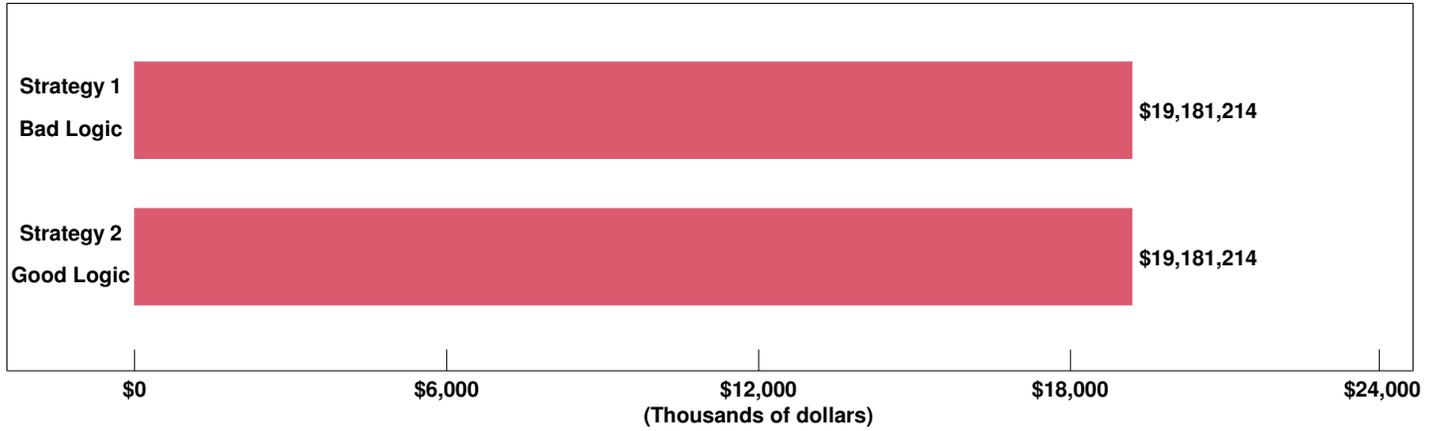
Sample Financial Analysis - Test 1: Strategy 1 v. Strategy 2

Presented By: [Licensed User's name appears here]

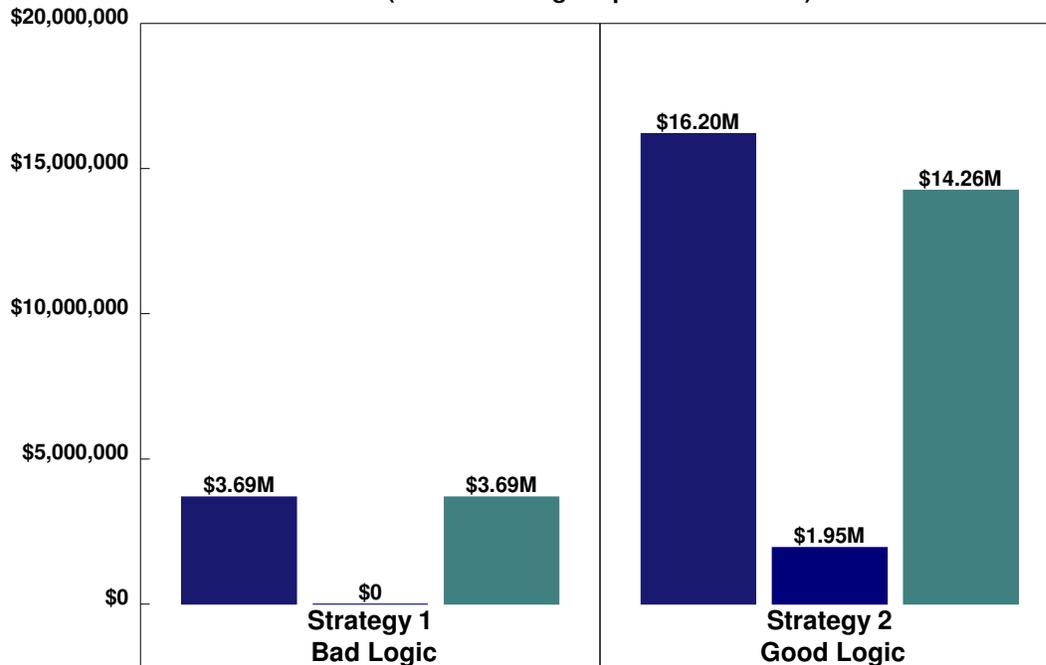
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Summary Analysis of Alternatives

Cumulative Spendable Cash Flow by Ages 94/89



Values at Ages 94/89 (After Providing Required Cash Flow)



- Cumulative Spendable Cash Flow
- Net Worth
- Transfer Taxes
- Wealth to Heirs

Sample Financial Analysis - Test 1: Strategy 1 v. Strategy 2

Presented By: [Licensed User's name appears here]

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Comparison of Alternatives

Year	M/F Ages	Spendable Cash Flow		Net Worth*		Wealth to Heirs	
		Strategy 1	Strategy 2	Strategy 1	Strategy 2	Strategy 1	Strategy 2
		Bad Logic	Good Logic	Bad Logic	Good Logic	Bad Logic	Good Logic
1	55/50	0	0	7,526,438	7,526,438	7,148,438	7,148,438
2	56/51	0	0	7,764,176	7,764,176	7,355,936	7,355,936
3	57/52	0	0	8,069,597	8,069,597	7,628,697	7,628,697
4	58/53	0	0	8,421,074	8,421,074	7,944,904	7,944,904
5	59/54	0	0	8,808,252	8,808,252	8,293,988	8,293,988
6	60/55	0	0	9,226,559	9,226,559	8,671,153	8,671,153
7	61/56	0	0	9,674,437	9,674,437	9,074,599	9,074,599
8	62/57	0	0	10,151,911	10,151,911	9,504,085	9,504,085
9	63/58	0	0	10,659,874	10,659,874	9,960,222	9,960,222
10	64/59	0	0	11,199,720	11,199,720	10,444,096	10,444,096
11	65/60	403,175	403,175	10,981,477	11,361,122	10,442,494	10,545,048
12	66/61	415,270	415,270	10,711,699	11,536,647	10,415,002	10,655,287
13	67/62	427,728	427,728	10,384,848	11,727,596	10,358,380	10,775,728
14	68/63	440,560	440,560	10,384,030	11,962,806	10,384,030	10,934,788
15	69/64	453,777	453,777	10,402,965	12,214,519	10,402,965	11,104,259
16	70/65	467,390	467,390	10,407,470	12,454,528	10,407,470	11,277,329
17	71/66	481,412	481,412	10,396,312	12,708,003	10,396,312	11,460,169
18	72/67	495,854	495,854	10,368,112	12,956,621	10,368,112	11,634,287
19	73/68	510,730	510,730	10,358,038	13,243,723	10,358,038	11,842,845
20	74/69	526,052	526,052	10,330,987	13,535,668	10,330,987	12,052,017
21	75/70	541,833	541,833	10,285,442	13,791,029	10,285,442	12,252,340
22	76/71	558,088	558,088	10,219,780	14,043,451	10,219,780	12,450,127
23	77/72	574,831	574,831	10,132,274	14,292,012	10,132,274	12,644,668
24	78/73	592,076	592,076	10,021,080	14,535,241	10,021,080	12,835,076
25	79/74	609,838	609,838	9,884,232	14,771,981	9,884,232	13,020,473
26	80/75	628,133	628,133	9,719,640	15,000,716	9,719,640	13,199,847
27	81/76	646,977	646,977	9,525,077	15,219,763	9,525,077	13,372,083
28	82/77	666,387	666,387	9,298,169	15,427,588	9,298,169	13,536,024
29	83/78	686,378	686,378	9,036,391	15,621,874	9,036,391	13,690,275
30	84/79	706,970	706,970	8,737,057	15,800,777	8,737,057	13,833,457
31	85/80	728,179	728,179	8,397,309	15,962,476	8,397,309	13,964,113
32	86/81	750,024	750,024	8,014,104	16,104,539	8,014,104	14,080,565
33	87/82	772,525	772,525	7,584,205	16,224,322	7,584,205	14,180,990
34	88/83	795,701	795,701	7,123,352	16,318,965	7,123,352	14,263,407
35	89/84	819,572	819,572	6,636,362	16,385,376	6,636,362	14,325,668
36	90/85	844,159	844,159	6,115,374	16,421,903	6,115,374	14,365,819
37	91/86	869,484	869,484	5,558,818	16,425,377	5,558,818	14,381,467
38	92/87	895,568	895,568	4,969,503	16,392,441	4,969,503	14,370,052
39	93/88	922,435	922,435	4,347,923	16,319,537	4,347,923	14,328,815
40	94/89	950,108	950,108	3,692,857	16,204,208	3,692,857	14,255,095
		19,181,214	19,181,214				

*After spendable cash flow.