

# Comparison of Plans

For: Simon Scott & Ann Scott



Presented By: \_\_\_\_\_

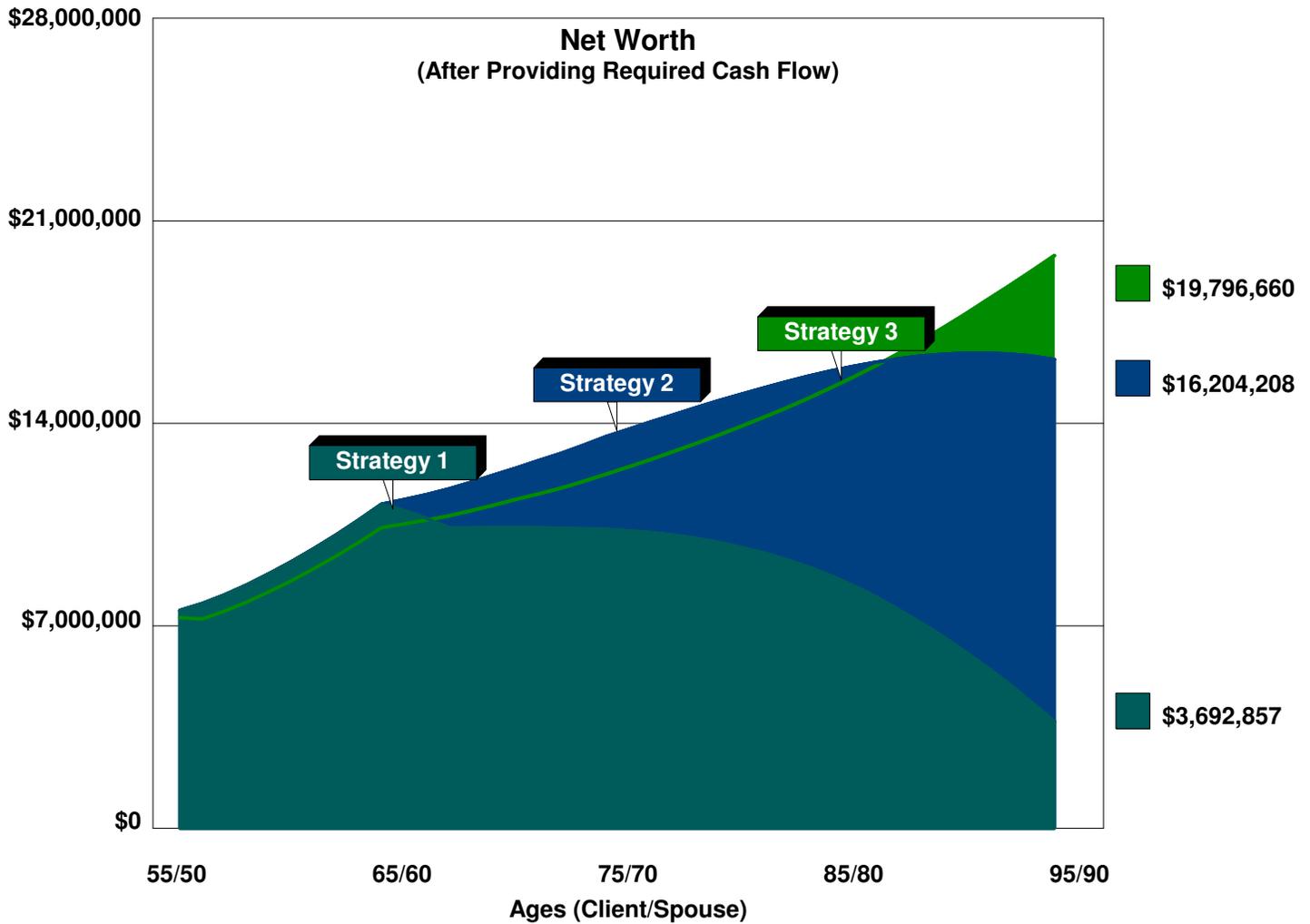
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# Sample Financial Analysis - Test 3: Strategy 1 v. Strategy 2 v. Strategy 3

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
Strategy 3: Good Logic + Roth IRAs + W.R.T.	\$19,796,660

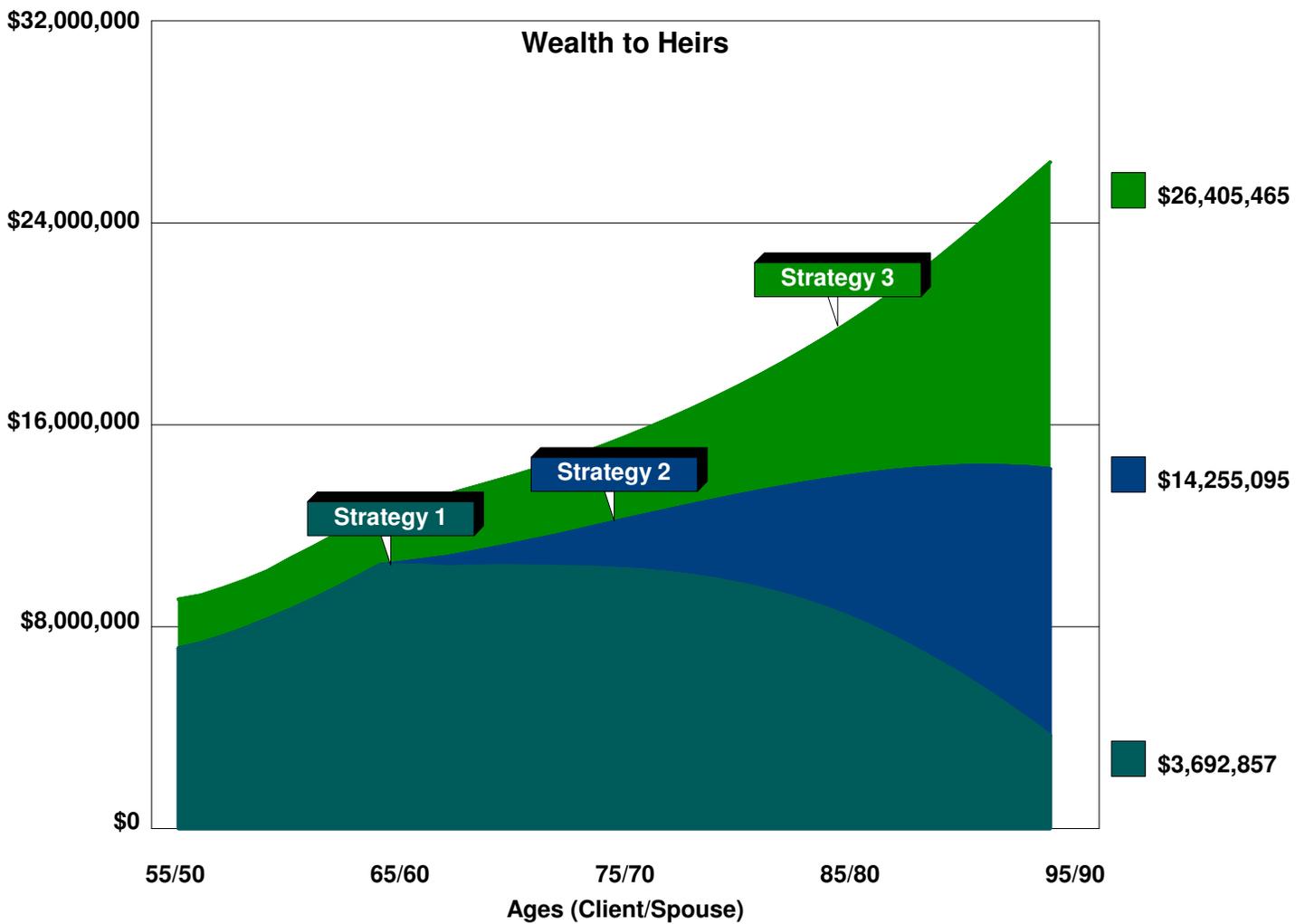
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# Sample Financial Analysis - Test 3: Strategy 1 v. Strategy 2 v. Strategy 3

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## Comparison of Alternatives



At Year 40

Strategy 1: Bad Logic	\$3,692,857
Strategy 2: Good Logic	\$14,255,095
Strategy 3: Good Logic + Roth IRAs + W.R.T.	\$26,405,465

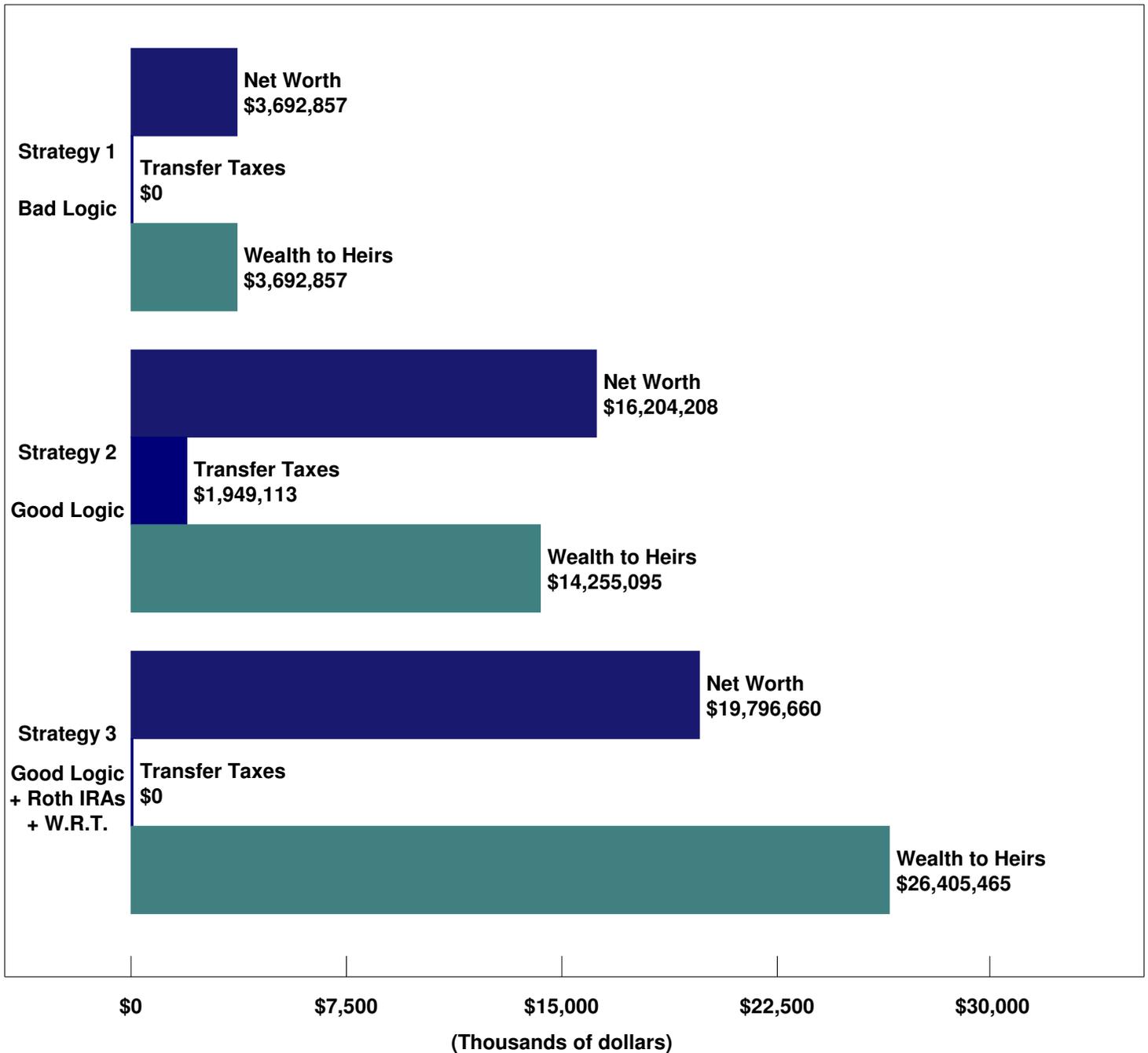
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# Sample Financial Analysis - Test 3: Strategy 1 v. Strategy 2 v. Strategy 3

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

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## Comparison of Alternatives at Ages 94/89



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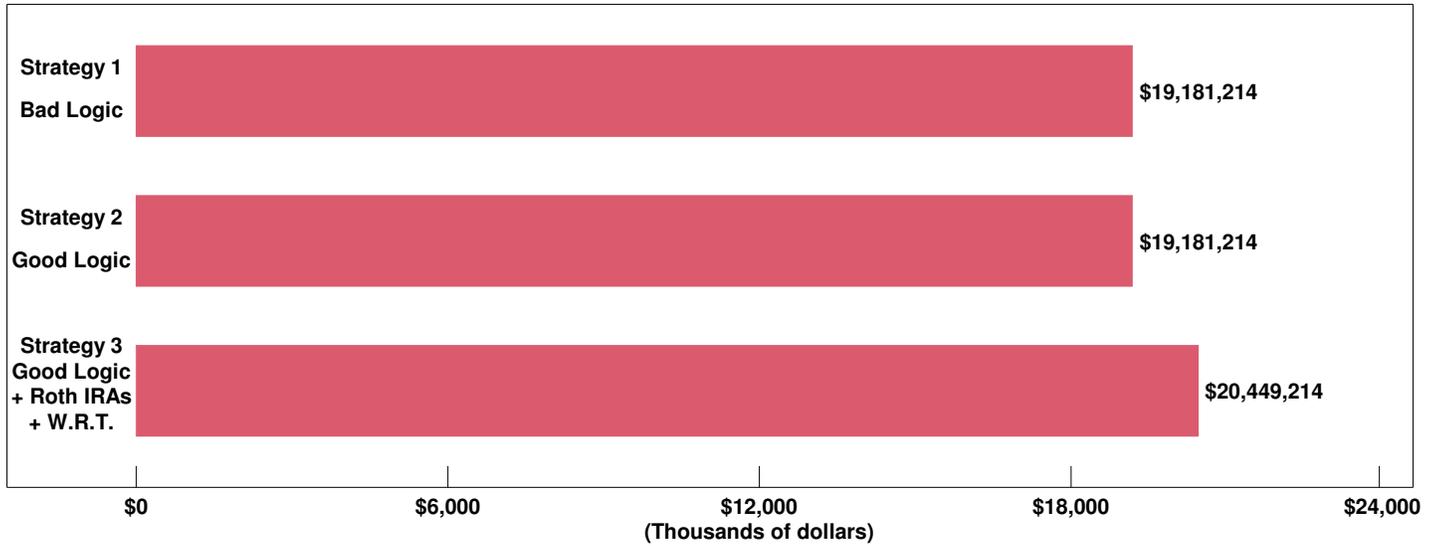
# Sample Financial Analysis - Test 3: Strategy 1 v. Strategy 2 v. Strategy 3

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

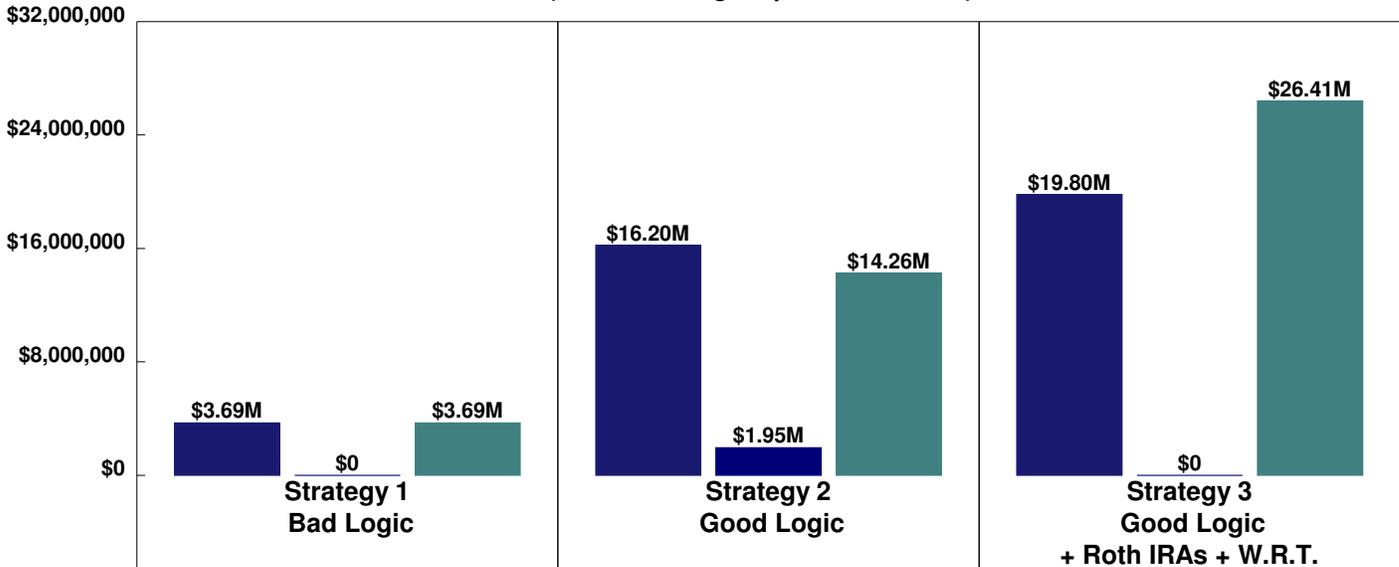
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## Summary Analysis of Alternatives

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

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# Sample Financial Analysis - Test 3: Strategy 1 v. Strategy 2 v. Strategy 3

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

For: Simon Scott & Ann Scott

## Comparison of Alternatives

Year	M/F Ages	Spendable Cash Flow			Net Worth*			Wealth to Heirs		
		Strategy 1	Strategy 2	Strategy 3	Strategy 1	Strategy 2	Strategy 3	Strategy 1	Strategy 2	Strategy 3
		Bad Logic	Good Logic	Good Logic + Roth IRAs + W.R.T.	Bad Logic	Good Logic	Good Logic + Roth IRAs + W.R.T.	Bad Logic	Good Logic	Good Logic + Roth IRAs + W.R.T.
1	55/50	0	0	245,000	7,526,438	7,526,438	7,276,048	7,148,438	7,148,438	9,085,252
2	56/51	0	0	263,000	7,764,176	7,764,176	7,239,491	7,355,936	7,355,936	9,244,161
3	57/52	0	0	20,000	8,069,597	8,069,597	7,512,929	7,628,697	7,628,697	9,524,622
4	58/53	0	0	20,000	8,421,074	8,421,074	7,831,719	7,944,904	7,944,904	9,851,006
5	59/54	0	0	20,000	8,808,252	8,808,252	8,185,491	8,293,988	8,293,988	10,213,055
6	60/55	0	0	20,000	9,226,559	9,226,559	8,569,657	8,671,153	8,671,153	10,709,037
7	61/56	0	0	20,000	9,674,437	9,674,437	8,982,644	9,074,599	9,074,599	11,154,178
8	62/57	0	0	20,000	10,151,911	10,151,911	9,424,459	9,504,085	9,504,085	11,630,891
9	63/58	0	0	20,000	10,659,874	10,659,874	9,895,978	9,960,222	9,960,222	12,140,273
10	64/59	0	0	20,000	11,199,720	11,199,720	10,398,578	10,444,096	10,444,096	12,683,968
11	65/60	403,175	403,175	423,175	10,981,477	11,361,122	10,521,914	10,442,494	10,545,048	12,851,898
12	66/61	415,270	415,270	435,270	10,711,699	11,536,647	10,655,208	10,415,002	10,655,287	13,033,599
13	67/62	427,728	427,728	447,728	10,384,848	11,727,596	10,799,315	10,358,380	10,775,728	13,229,919
14	68/63	440,560	440,560	460,560	10,384,030	11,962,806	10,986,077	10,384,030	10,934,788	13,472,866
15	69/64	453,777	453,777	473,777	10,402,965	12,214,519	11,177,227	10,402,965	11,104,259	13,724,832
16	70/65	467,390	467,390	487,390	10,407,470	12,454,528	11,368,047	10,407,470	11,277,329	13,981,591
17	71/66	481,412	481,412	501,412	10,396,312	12,708,003	11,561,836	10,396,312	11,460,169	14,246,754
18	72/67	495,854	495,854	515,854	10,368,112	12,956,621	11,758,886	10,368,112	11,634,287	14,520,926
19	73/68	510,730	510,730	530,730	10,358,038	13,243,723	11,996,124	10,358,038	11,842,845	14,841,326
20	74/69	526,052	526,052	546,052	10,330,987	13,535,668	12,240,336	10,330,987	12,052,017	15,174,984
21	75/70	541,833	541,833	561,833	10,285,442	13,791,029	12,492,030	10,285,442	12,252,340	15,522,547
22	76/71	558,088	558,088	578,088	10,219,780	14,043,451	12,751,773	10,219,780	12,450,127	15,884,963
23	77/72	574,831	574,831	594,831	10,132,274	14,292,012	13,020,203	10,132,274	12,644,668	16,263,756
24	78/73	592,076	592,076	612,076	10,021,080	14,535,241	13,298,028	10,021,080	12,835,076	16,660,378
25	79/74	609,838	609,838	629,838	9,884,232	14,771,981	13,586,042	9,884,232	13,020,473	17,076,283
26	80/75	628,133	628,133	648,133	9,719,640	15,000,716	13,885,141	9,719,640	13,199,847	17,513,061
27	81/76	646,977	646,977	666,977	9,525,077	15,219,763	14,196,320	9,525,077	13,372,083	17,972,088
28	82/77	666,387	666,387	686,387	9,298,169	15,427,588	14,520,692	9,298,169	13,536,024	18,454,296
29	83/78	686,378	686,378	706,378	9,036,391	15,621,874	14,859,498	9,036,391	13,690,275	18,960,774
30	84/79	706,970	706,970	726,970	8,737,057	15,800,777	15,214,122	8,737,057	13,833,457	19,493,298
31	85/80	728,179	728,179	748,179	8,397,309	15,962,476	15,586,105	8,397,309	13,964,113	20,054,107
32	86/81	750,024	750,024	770,024	8,014,104	16,104,539	15,977,158	8,014,104	14,080,565	20,645,524
33	87/82	772,525	772,525	792,525	7,584,205	16,224,322	16,389,180	7,584,205	14,180,990	21,269,792
34	88/83	795,701	795,701	815,701	7,123,352	16,318,965	16,824,284	7,123,352	14,263,407	21,929,174
35	89/84	819,572	819,572	839,572	6,636,362	16,385,376	17,284,588	6,636,362	14,325,668	22,625,038
36	90/85	844,159	844,159	864,159	6,115,374	16,421,903	17,765,046	6,115,374	14,365,819	23,350,411
37	91/86	869,484	869,484	889,484	5,558,818	16,425,377	18,256,553	5,558,818	14,381,467	24,094,008
38	92/87	895,568	895,568	915,568	4,969,503	16,392,441	18,759,058	4,969,503	14,370,052	24,853,438
39	93/88	922,435	922,435	942,435	4,347,923	16,319,537	19,272,470	4,347,923	14,328,815	25,625,785
40	94/89	950,108	950,108	970,108	3,692,857	16,204,208	19,796,660	3,692,857	14,255,095	26,405,465
		19,181,214	19,181,214	20,449,214						

\*After providing required cash flow.

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