

Annual Plan Summary

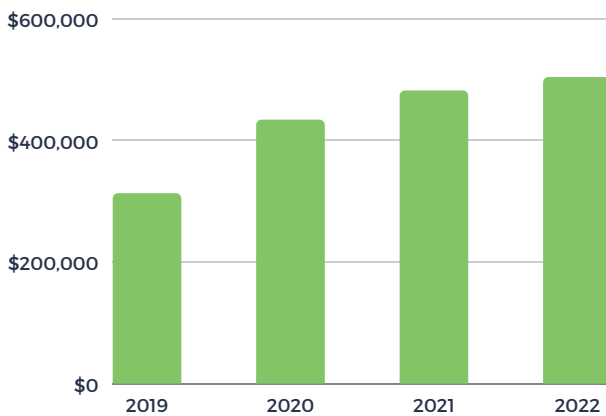
FOR CLIENT A AND CLIENT B

OBJECTIVES

- Invest Until Work is Optional
- Pursue Additional Ways to Increase Income
- Save For X and Y's Education
- Complete Estate Plan and Insurance

STATUS

In Progress, On Track
In Progress, On Track
In Progress, On Track
On Hold

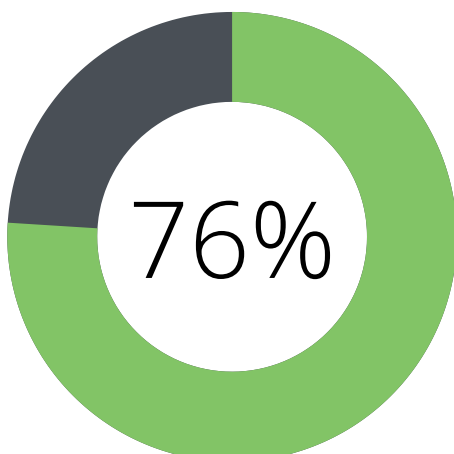
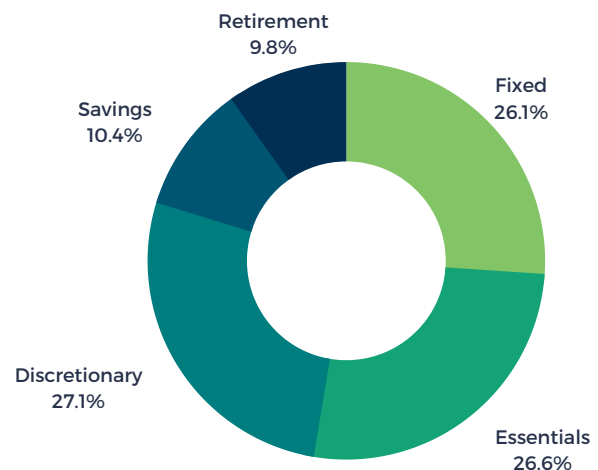


NET WORTH OVER TIME

Your Net Worth has grown to about \$500,000 over the last four years of work. This is largely due to better-than-expected market returns, your savings rate for retirement, and your ability to pay down your debts.

CASH FLOW BREAKDOWN

This chart shows the breakdown of your current cashflow. Your Savings Rate is about 20% and you're able to spend about 27% of your income on things you want in the near term. Increasing your savings will speed up goal achievement, but will likely cost some of today's joy.



MONTE CARLO SUCCESS RATE

This is your updated Monte Carlo Success Rate as the plan currently stands. To increase your rate of success, save at a higher-than-expected rate, reduce your planned retirement expenses, or increase your income. See the full financial plan for details.