

ARE MY CURRENT RETIREMENT SAVINGS SUFFICIENT?

Date: April 1, 2026



INTRODUCTION

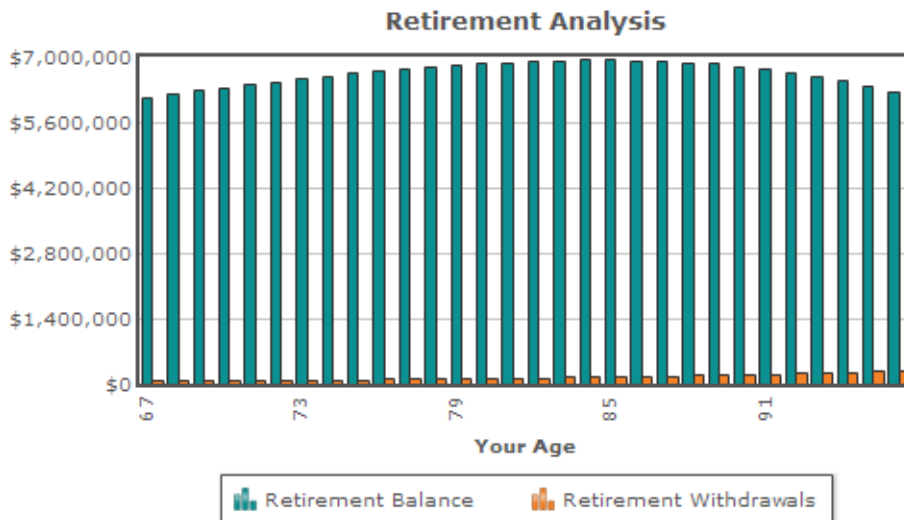
Use this retirement planning calculator to determine when/if the money will run out during retirement and it will recommend additional savings if required.

SUMMARY OF INPUT

Your current age	67	Current annual income	\$50,000
Spouse's annual income (if applicable)	\$0	Current retirement savings balance	\$6,000,000
Current annual savings amount	\$0	Current annual savings increases	0.00%
Annual pension benefit at retirement	\$0	Pension increases with inflation?	No
Expected inflation	6.00%	Desired retirement age	67
Number of years of retirement income	30	Income replacement at retirement	100.00%
Pre-retirement investment return	0.00%	Post-retirement investment return	2.00%
Include Social Security benefits?	No	Marital status	Single

ANALYSIS

Congratulations!!! It appears that you have saved enough to meet your goal. In fact, it appears that at age 97 you will still have \$5,953,008 in your retirement accounts.



Age	Salary @ 6.0%	Beginning Retirement Balance	Interest Pre-Ret 0.0% Post-Ret 2.0%	Current Savings	Desired Retirement Income 100.0%	Pension Income	Social Security Income	Retirement Account Withdrawals	Ending Retirement Balance
67	\$0	\$6,000,000	\$120,000	\$0	\$50,000	\$0	\$0	\$50,000	\$6,070,000
68	0	6,070,000	121,400	0	53,000	0	0	53,000	6,138,400
69	0	6,138,400	122,768	0	56,180	0	0	56,180	6,204,988
70	0	6,204,988	124,100	0	59,551	0	0	59,551	6,269,537
71	0	6,269,537	125,391	0	63,124	0	0	63,124	6,331,804
72	0	6,331,804	126,636	0	66,911	0	0	66,911	6,391,529

This information may help you analyze your financial needs. It is based on information and assumptions provided by you regarding your goals, expectations and financial situation. The calculations do not infer that the company assumes any fiduciary duties. The calculations provided should not be construed as financial, legal or tax advice. In addition, such information should not be relied upon as the only source of information. This information is supplied from sources we believe to be reliable but we cannot guarantee its accuracy. Hypothetical illustrations may provide historical or current performance information. Past performance does not guarantee nor indicate future results.

73	0	6,391,529	127,831	0	70,926	0	0	70,926	6,448,433
74	0	6,448,433	128,969	0	75,182	0	0	75,182	6,502,220
75	0	6,502,220	130,044	0	79,692	0	0	79,692	6,552,572
76	0	6,552,572	131,051	0	84,474	0	0	84,474	6,599,150
77	0	6,599,150	131,983	0	89,542	0	0	89,542	6,641,591
78	0	6,641,591	132,832	0	94,915	0	0	94,915	6,679,507
79	0	6,679,507	133,590	0	100,610	0	0	100,610	6,712,488
80	0	6,712,488	134,250	0	106,646	0	0	106,646	6,740,091
81	0	6,740,091	134,802	0	113,045	0	0	113,045	6,761,848
82	0	6,761,848	135,237	0	119,828	0	0	119,828	6,777,257
83	0	6,777,257	135,545	0	127,018	0	0	127,018	6,785,784
84	0	6,785,784	135,716	0	134,639	0	0	134,639	6,786,861
85	0	6,786,861	135,737	0	142,717	0	0	142,717	6,779,882
86	0	6,779,882	135,598	0	151,280	0	0	151,280	6,764,199
87	0	6,764,199	135,284	0	160,357	0	0	160,357	6,739,126
88	0	6,739,126	134,783	0	169,978	0	0	169,978	6,703,931
89	0	6,703,931	134,079	0	180,177	0	0	180,177	6,657,833
90	0	6,657,833	133,157	0	190,987	0	0	190,987	6,600,002
91	0	6,600,002	132,000	0	202,447	0	0	202,447	6,529,555
92	0	6,529,555	130,591	0	214,594	0	0	214,594	6,445,553
93	0	6,445,553	128,911	0	227,469	0	0	227,469	6,346,995
94	0	6,346,995	126,940	0	241,117	0	0	241,117	6,232,817
95	0	6,232,817	124,656	0	255,584	0	0	255,584	6,101,889
96	\$0	\$6,101,889	\$122,038	\$0	\$270,919	\$0	\$0	\$270,919	\$5,953,008

This information may help you analyze your financial needs. It is based on information and assumptions provided by you regarding your goals, expectations and financial situation. The calculations do not infer that the company assumes any fiduciary duties. The calculations provided should not be construed as financial, legal or tax advice. In addition, such information should not be relied upon as the only source of information. This information is supplied from sources we believe to be reliable but we cannot guarantee its accuracy. Hypothetical illustrations may provide historical or current performance information. Past performance does not guarantee nor indicate future results.
