

RETIREMENT INCOME & INVESTMENT REVIEW

Date

GOALS & EXPECTATIONS	
Annual income goal at retirement	\$
Social Security start year	
Benefit amount expected	\$
Other guaranteed income expected (Pension Annuity Income Sources, etc.)	\$
Legacy Goal	\$
ANNUAL PORTFOLIO INCOME EXPECTATIONS	
Number of years before guaranteed income begins	
Annual portfolio income goal (X) number of years prior to GI	\$
Annual portfolio income goal after GI begins	\$
Current Retirement Portfolio Blend	
Historic Average Return	
_____% Equity _____% Fixed Income _____% Cash _____% Alternatives	
Monté Carlo likelihood of success for current strategy	
Recommended Retirement Portfolio Blend Pre-Retirement	
Historic Average Return	
_____% Equity _____% Fixed Income _____% Cash _____% Alternatives	
Recommended Retirement Portfolio Blend Post-Retirement	
Historic Average Return	
_____% Equity _____% Fixed Income _____% Cash _____% Alternatives	

RISKS, OPPORTUNITIES, AND RECOMMENDATIONS