

BG CAPITAL

Investment Projections

11/28/2020

Current Total Net Worth: \$100,000

Current Total Invested: \$75,000

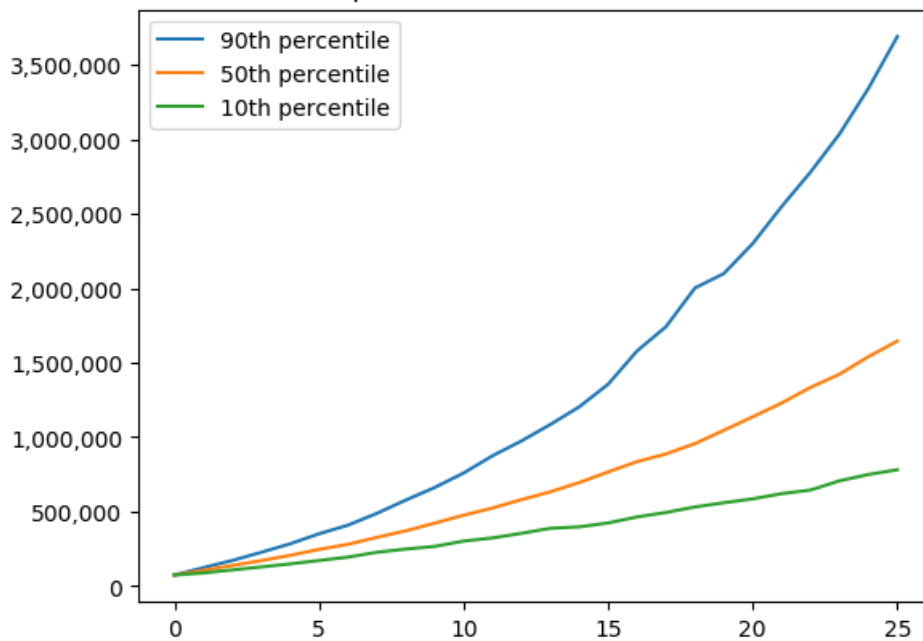
Assumptions:

Annual Contribution: \$25,500

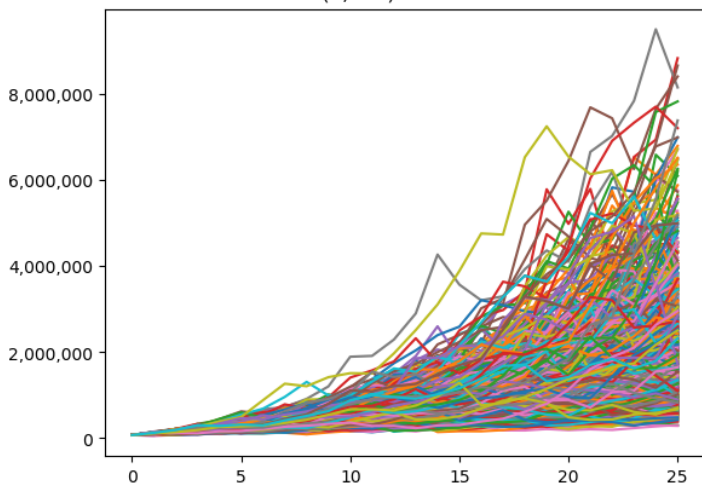
Expected Yield: 7.0%

Expected Volatility: 18.1%

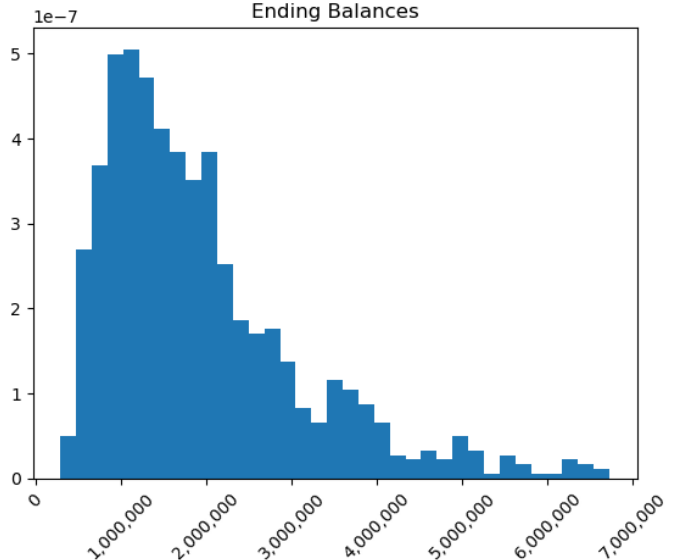
Top 10% - Median - Bottom 10%



All (1,000) Simulations



Ending Balances



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Withdrawal Analysis

11/28/2020

Retirement Starting Portfolio: \$1,647,081

Yearly Withdrawal: \$100,000

Assumptions:

Starting portfolio value from projection median

Expected Yield: 7.0%

Expected Volatility: 18.1%

