

# E.H. HOWARD & ASSOCIATES

## Professional Retirement Analysis Report

### Retirement Analysis for John Smith

STATUS: NEEDS ATTENTION &

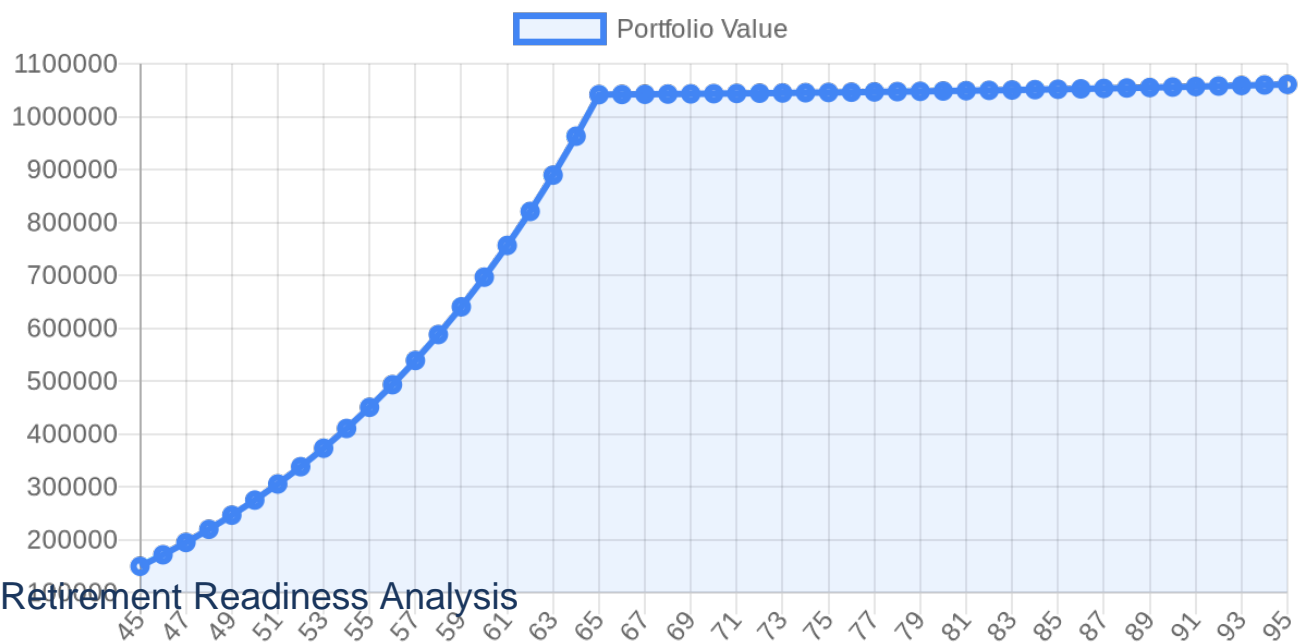
#### Client Summary

Target Retirement Age:	65
Current Savings:	\$150,000
Target Retirement Income:	\$60,000

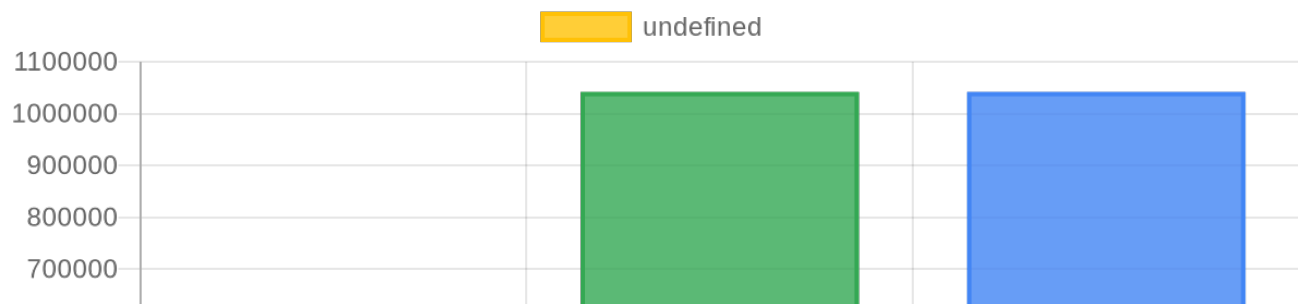
#### Retirement Projections

Portfolio at Retirement	Annual Retirement Income
\$1,041,652	\$41,666

#### Portfolio Growth Over Time



#### Retirement Readiness Analysis



# Three-Account Retirement Strategy

# Professional Recommendations

- Maintain a diversified portfolio across multiple account types

- Consider maximizing contributions to tax-advantaged accounts

- Review and adjust your retirement plan annually

- Plan for healthcare costs in retirement

- Consider working with a financial advisor for personalized guidance



# Next Steps







personalized advice.