



Calculator Report



Plan Prepared For: 123 1232

Plan Details

Client Name	Date Of Birth		
123 1232	12/5/1989		
Starting Account Value	Plan Duration	Market Conditions	Allocations
\$12,333.00	20	3	Aggressive

Market Conditions	
Equity	Fixed Income
Normal	Normal

Annuity Details

Product
Pacific Index Advisory - Limited - Premium Fixed, Indexed Annuity

Replacement Percentage	Annuity Index Breakdown	
23%	S&P 500 - Index Point to Point	100%
	S&P 500 - 1 Year Performance Triggered Index	0%
	MSCI EAFE Index Point to Point	0%
	MSCI EAFE - 1 Year Performance Triggered Index	0%
	Fixed Account	0%

3-year Cumulative Wealth

10th Percentile	50th Percentile	90th Percentile
\$13,873.65	\$18,766.73	\$18,245.12

20-year Cumulative Wealth

10th Percentile	50th Percentile	90th Percentile
\$22,594.85	\$43,399.41	\$84,636.32

Additional Metrics

Unrealized Taxes	Sortino Ratio	Sharpe Ratio
\$2,162.25	1.19%	0.60%



● Domestic Equity	60%
US Large Core	20%
US Mid Core	20%
US Small Core	20%
● International Equity	10%
Developed Markets	5%
Emerging Markets	5%
● Fixed Income	30%
Short Term Corporate Bond	5%
Short Term US Govt Bond	5%
Intermediate Corporate Bond	5%
Intermediate Government Bond	5%
High Yield	5%
Global Bonds	5%

3-year Cumulative Wealth

10th Percentile	50th Percentile	90th Percentile
\$19,030.50	\$15,544.67	\$16,324.76

20-year Cumulative Wealth

10th Percentile	50th Percentile	90th Percentile
\$26,232.61	\$55,198.20	\$118,486.17

Additional Metrics

Unrealized Taxes	Sortino Ratio	Sharpe Ratio
\$1,365.07	1.46%	0.62%



● Domestic Equity	60%
US Large Core	20%
US Mid Core	20%
US Small Core	20%
● International Equity	10%
Developed Markets	5%
Emerging Markets	5%
● Fixed Income	7.0000000000000001%
Short Term Corporate Bond	1.1666666666666667%
Short Term US Govt Bond	1.1666666666666667%
Intermediate Corporate Bond	1.1666666666666667%
Intermediate Government Bond	1.1666666666666667%
High Yield	1.1666666666666667%
Global Bonds	1.1666666666666667%
● Pacific Index Advisory - Limited - Premium Fixed, Indexed Annuity	23%
S&P 500 - Index Point to Point	23%
S&P 500 - 1 Year Performance Triggered Index	0%
MSCI EAFE Index Point to Point	0%
MSCI EAFE - 1 Year Performance Triggered Index	0%
Fixed Account	0%

