Retirement Analysis Summary

Pre-Tax Income: \$126,000.00/year (2024 dollars) Post-Tax Income: \$96,582.50/year (2024 dollars) Retirement Income: \$96,582.50/year (2024 dollars)

Investment Period: 42 years Retirement Period: 35 years Expected Return: 7.0% Inflation Rate: 3.0% Financial Goals:

- 1. Supplemented (60.0%): 60.0% of income comes from retirement account
- 2. Sustainable Retirement: Retirement account will be empty at the end of retirement
- 3. Generational Wealth: Can perpetually pull from account without loss of value
- 4. Nobility (+2.0%/yr): Pulling from account doesn't stop account growth

		R Supplemented (60.0%)	equired Principal Sustainable Retirement	by Financial Goo Generational Wealth	al Nobility (+2.0%/yr)	1e	7 2 5
	Brokerage _ Account	\$2,845,283	\$7,113,206	\$11,330,260	\$35,183,438		- 3.5 - 3.0
	Traditional IRA -	\$3,493,823	\$8,734,558	\$11,860,428	\$23,720,857		- 2.5 €
Account Type	Roth IRA -	\$2,461,515	\$6,153,787	\$8,356,067	\$16,712,133		- 2.0 d
Acc	Traditional _ 401k	\$3,493,823	\$8,734,558	\$11,860,428	\$23,720,857		- 1.5 5 - 1.0
	Roth 401k -	\$2,461,515	\$6,153,787	\$8,356,067	\$16,712,133		- 0.5



		Supplemented (60.0%)	early Contributior Sustainable Retirement	Generational Wealth	Nobility (+2.0%/yr)
	Brokerage _ Account	\$12,337 (12.8%)	\$30,842 (31.9%)	\$49,127 (50.9%)	\$152,552 (158.0%)
ıype ıL	raditional IRA -	\$15,149 (15.7%)	\$37,872 (39.2%)	\$51,426 (53.2%)	\$102,851 (106.5%)
Account Iy	Roth IRA -	\$10,673 (11.1%)	\$26,682 (27.6%)	\$36,231 (37.5%)	\$72,462 (75.0%)
Ä	Traditional _ 401k -	\$14,391 (14.9%)	\$35,979 (37.3%)	\$48,854 (50.6%)	\$97,709 (101.2%)
	Roth 401k -	\$10,139 (10.5%)	\$25,348 (26.2%)	\$34,420 (35.6%)	\$68,839 (71.3%)

Financial Goal

