## **Retirement Analysis Summary**

Pre-Tax Income: \$95,000.00/year (2024 dollars) Post-Tax Income: \$74,991.50/year (2024 dollars) Retirement Income: \$74,991.50/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)	16	e7
	Brokerage _ Account	\$2,209,220	\$5,523,050	\$8,797,382	\$27,318,187		- 2.5
Type	Traditional IRA -	\$2,628,945	\$6,572,364	\$8,924,442	\$17,848,883		- 2.0 <del>⊕</del>
Account Ty	Roth IRA -	\$1,911,243	\$4,778,109	\$6,488,069	\$12,976,139		- 1.5 - Lincipal
Acc	Traditional _ 401k	\$2,628,945	\$6,572,364	\$8,924,442	\$17,848,883		- 1.0
	Roth 401k -	\$1,911,243	\$4,778,109	\$6,488,069	\$12,976,139		- 0.5

## Financial Goal

- 100000

80000

60000

- 40000

- 20000

		Supplemented (60.0%)	early Contributior Sustainable Retirement	Generational Wealth	Nobility (+2.0%/yr)
	Brokerage _ Account	\$9,579 (12.8%)	\$23,947 (31.9%)	\$38,145 (50.9%)	\$118,449 (158.0%)
Tra	aditional IRA -	\$11,399 (15.2%)	\$28,497 (38.0%)	\$38,696 (51.6%)	\$77,391 (103.2%)
Account 1)	Roth IRA -	\$8,287 (11.1%)	\$20,717 (27.6%)	\$28,132 (37.5%)	\$56,263 (75.0%)
Ä	Traditional _ 401k	\$10,829 (14.4%)	\$27,072 (36.1%)	\$36,761 (49.0%)	\$73,522 (98.0%)
	Roth 401k -	\$7,873 (10.5%)	\$19,682 (26.2%)	\$26,725 (35.6%)	\$53,450 (71.3%)

Financial Goal