Landing Pages

When the application opens, the user will be presented with one of two types of screens. First timers and incomplete data will be shown the Welcome Screen. Once the data has been complete one of Four Screens will appear depending on the state of retirement.

Welcome Screen

Welcome

Retirement

Retirement Planning with the Bucket System

Get Started Now!

Advice | Snap Shot | Review | Share

Screen 1

Retirement

Congratulations!
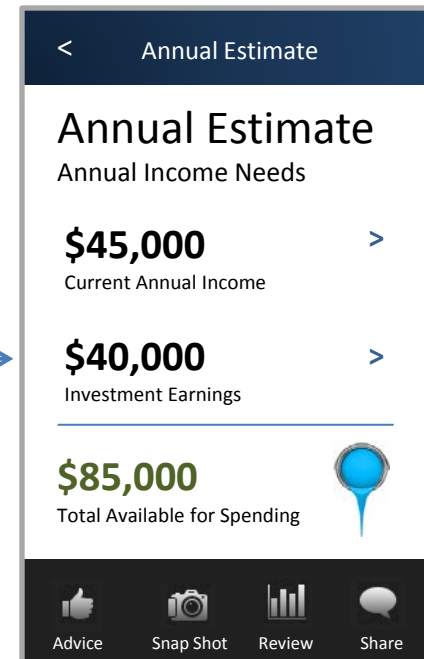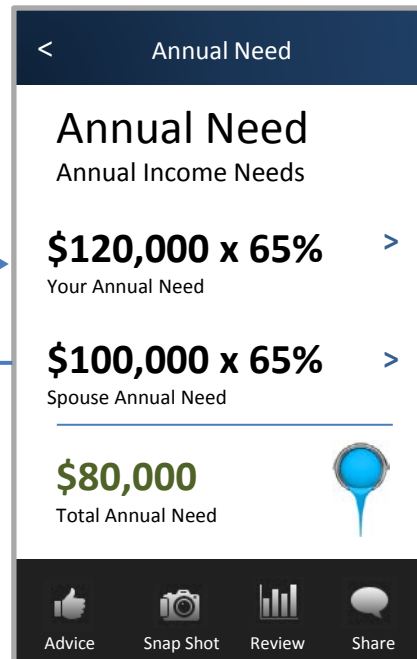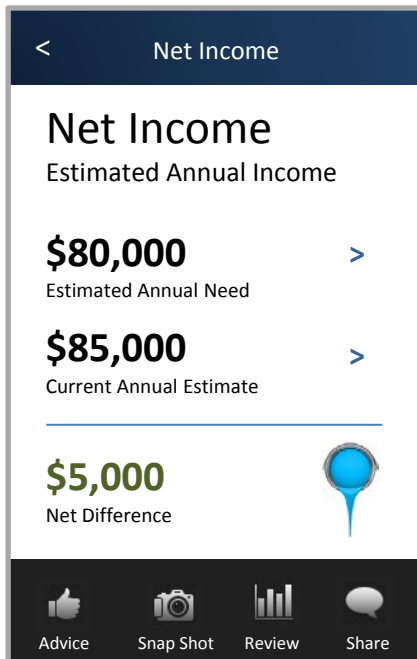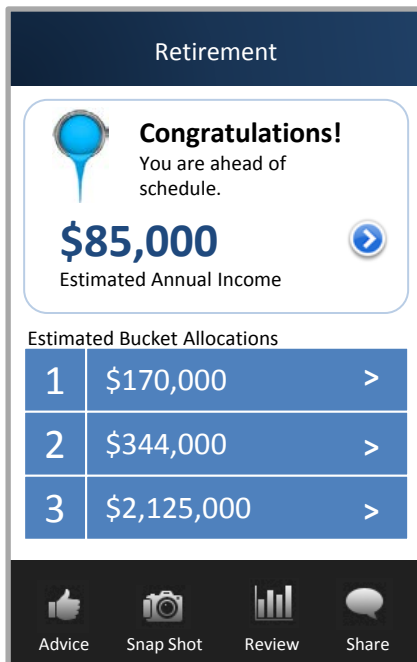You are ahead of schedule.

$85,000
Estimated Annual Income

Estimated Bucket Allocations

1	$170,000	>
2	$344,000	>
3	$2,125,000	>

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Screen 2

Retirement

Close!
You are just behind your schedule.

$78,000
Estimated Annual Income

Estimated Bucket Allocations

1	$170,000	>
2	$344,000	>
3	$2,125,000	>

Advice | Snap Shot | Review | Share

Screen 3

Retirement

Falling Behind!
You are falling behind schedule.

$55,000
Estimated Annual Income

Estimated Bucket Allocations

1	$170,000	>
2	$344,000	>
3	$2,125,000	>

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Screen 4

Retirement

Yikes!
You cannot meet your needs in Retirement.

$25,000
Estimated Annual Income

Estimated Bucket Allocations

1	$170,000	>
2	$344,000	>
3	$2,125,000	>

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Here we show a couple of additional screens that explain the numbers found on the primary landing screen.

Retirement

Congratulations!
You are ahead of schedule.

$85,000
Estimated Annual Income

Estimated Bucket Allocations

1	$170,000	>
2	$344,000	>
3	$2,125,000	>

Advice | Snap Shot | Review | Share

< Net Income

Net Income
Estimated Annual Income

$80,000 >
Estimated Annual Need

$85,000 >
Current Annual Estimate

$5,000
Net Difference

Advice | Snap Shot | Review | Share

< Annual Need

Annual Need
Annual Income Needs

$120,000 x 65% >
Your Annual Need

$100,000 x 65% >
Spouse Annual Need

$80,000
Total Annual Need

Advice | Snap Shot | Review | Share

< Annual Estimate

Annual Estimate
Annual Income Needs

$45,000 >
Current Annual Income

$40,000 >
Investment Earnings

$85,000
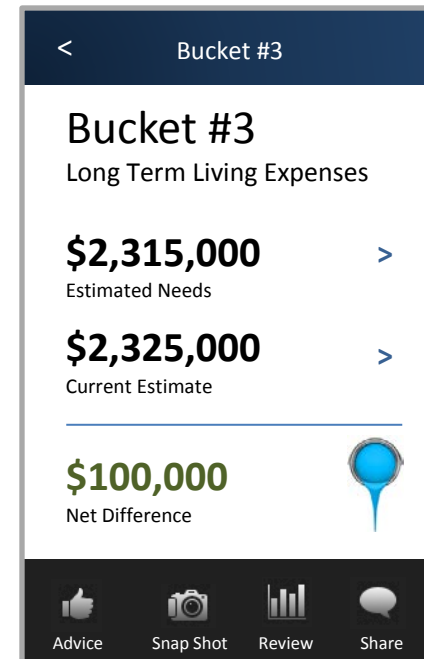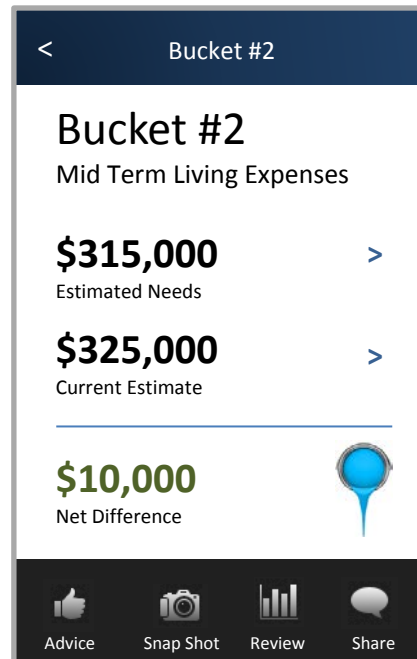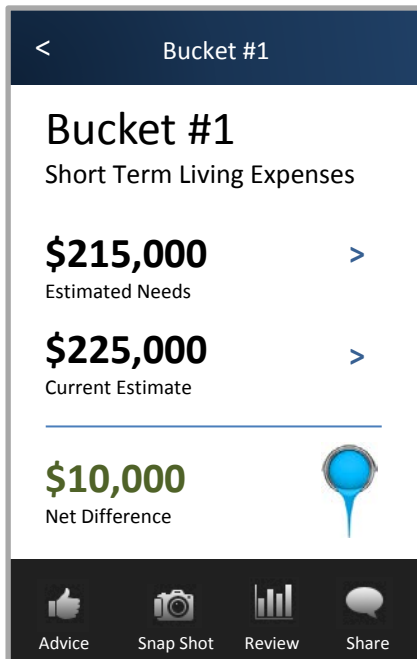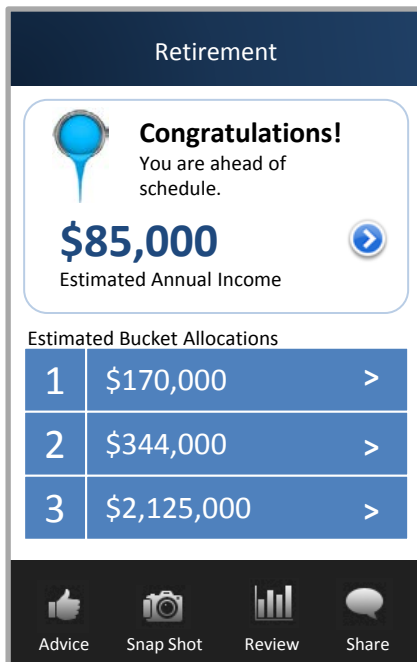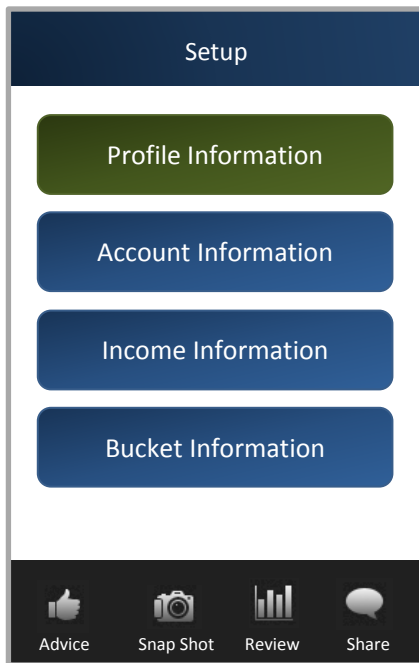Total Available for Spending

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More Information
Buckets

Here we show a couple of additional screens that explain the numbers found on the primary landing screen.

Retirement

Congratulations!
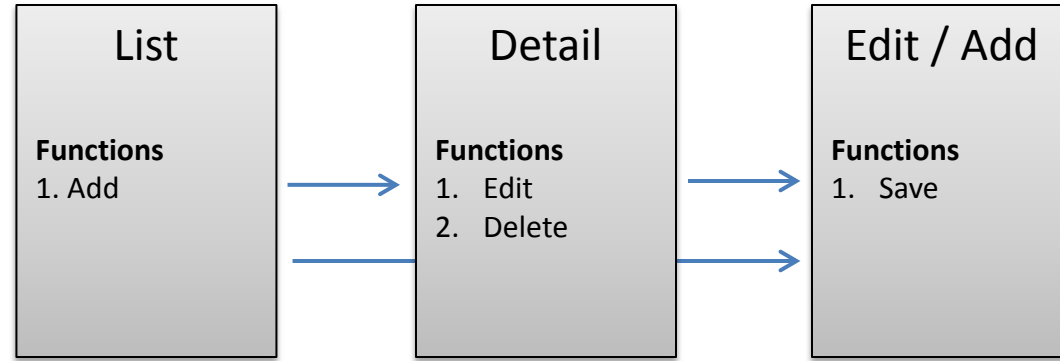You are ahead of schedule.

$85,000
Estimated Annual Income

Estimated Bucket Allocations

1	$170,000	>
2	$344,000	>
3	$2,125,000	>

Advice   Snap Shot   Review   Share

< Bucket #1

Bucket #1
Short Term Living Expenses

$215,000 >
Estimated Needs

$225,000 >
Current Estimate

$10,000
Net Difference

Advice   Snap Shot   Review   Share

< Bucket #2

Bucket #2
Mid Term Living Expenses

$315,000 >
Estimated Needs

$325,000 >
Current Estimate

$10,000
Net Difference

Advice   Snap Shot   Review   Share

< Bucket #3

Bucket #3
Long Term Living Expenses

$2,315,000 >
Estimated Needs

$2,325,000 >
Current Estimate

$100,000
Net Difference

Advice   Snap Shot   Review   Share

Account Setup

Setup
Profile Information
Account Information
Income Information
Bucket Information

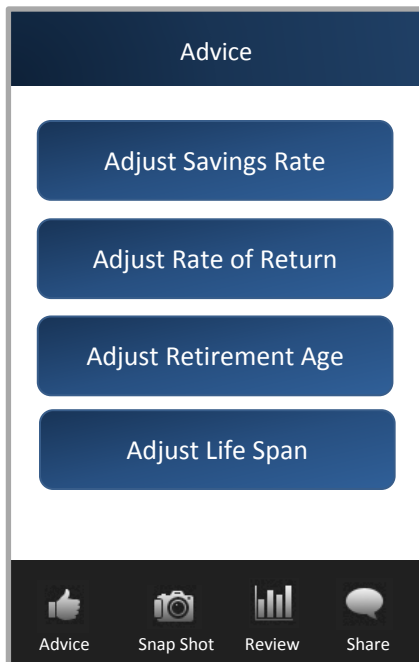| Advice	Snap Shot	Review	Share

The end user will need to setup several different information entities. These include the profile information, account information, retirement income information, and bucket information. Each area will follow the same model with a list view, detail view and the edit view.
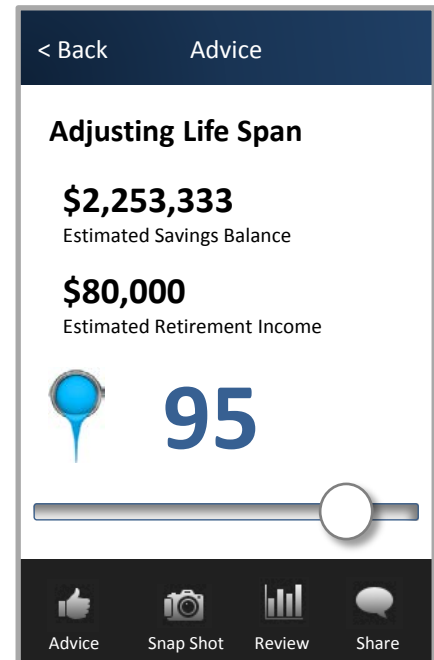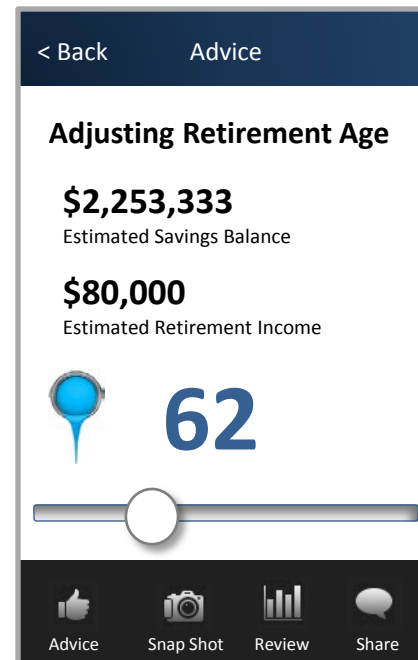
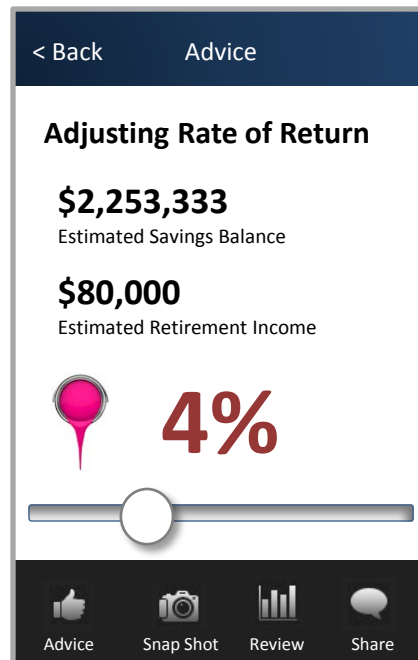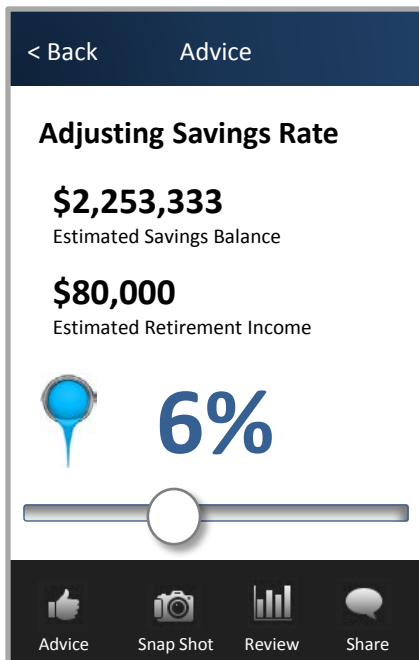| List	Detail	Edit / Add
Functions	**Functions**	**Functions**
1. Add	1. Edit	1. Save
	2. Delete	

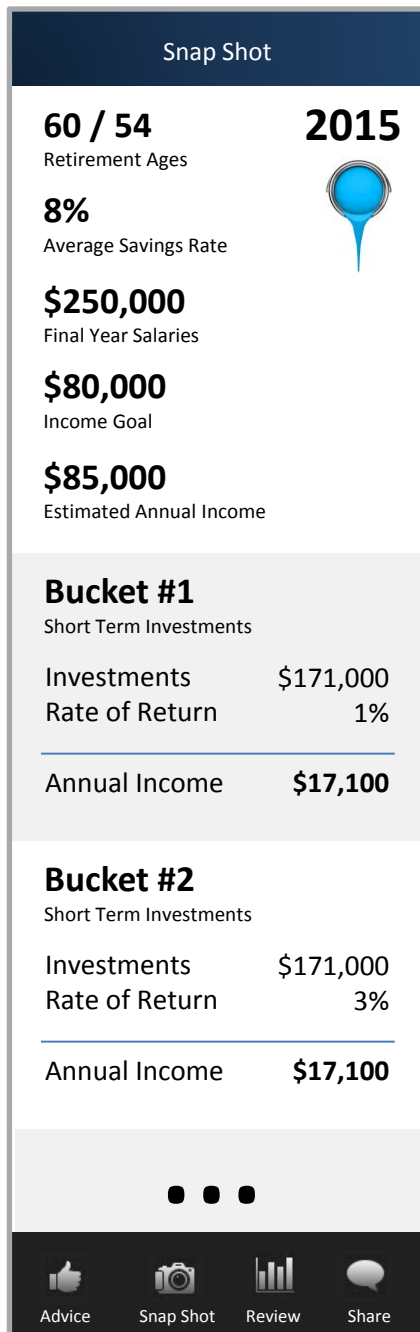See the data section for screen designs.

Advice Setup

The end user will need to setup several different information entities. These include the profile information, account information, retirement income information, and bucket information. Each area will follow the same model with a list view, detail view and the edit view.

Snap Shot

Snap Shot	
60 / 54	**2015**
Retirement Ages	
8%	
Average Savings Rate	
$250,000	
Final Year Salaries	
$80,000	
Income Goal	
$85,000	
Estimated Annual Income	

Bucket #1
Short Term Investments

Investments	$171,000
Rate of Return	1%
Annual Income	**$17,100**

Bucket #2
Short Term Investments

Investments	$171,000
Rate of Return	3%
Annual Income	**$17,100**

● ● ●

Advice	Snap Shot	Review	Share

The snap shot gives the user a quick view of the current situation. We may change this view as development begins.

Notice the year on the top right. This screen will also be used with the out years table but on a year by year basis.

Review Information

Screen 1: Review

Value	Income

2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>
2016:	$2,165,000	>
2015:	$2,175,000	>

● ● ●

Advice   Snap Shot   Review   Share

Screen 2: Snap Shot

Snap Shot

65 / 59
Retirement Ages

2020

8%
Average Savings Rate

$250,000
Final Year Salaries

$80,000
Income Goal

$85,000
Estimated Annual Income

Bucket #1
Short Term Investments

Investments	$171,000
Rate of Return	1%
Annual Income	**$17,100**

Bucket #2
Short Term Investments

Investments	$171,000
Rate of Return	3%
Annual Income	**$17,100**

● ● ●

Advice   Snap Shot   Review   Share

The information review is a sort of amortization table show the investment value or the income generated from the different buckets.

The arrow shows the detail screen.

Data Collection Views

- Personal Information

- Account Information

- Retirement Income Information

- Bucket Information

Personal Information

Add Description.

Screen 1 — Personal

Personal

Your Information >
80% Complete

Spouse Information >
0% Complete

Advice Snap Shot Review Share

Screen 2 — Personal (Edit)

< **Personal** Edit

Name:
Mark Smith

Current Age:
51

Retirement Age:
62

Annual Salary
$70,000.00

● ● ●

Advice Snap Shot Review Share

Screen 3 — Personal (Save)

< **Personal** Save

Name

Current Age ⬇

Retirement Age ⬇

Annual Salary

Annual Raise Percentage ⬇

Income Goal

Savings Rate ⬇

Inflation Rate ⬇

Advice Snap Shot Review Share

Account Information

Add Description.

Screen 1: Account List

Account	
Retirement 401 (Mark) Type: 401k	›
Retirement (Mary) Type: 401k	›
IRA (Mark) Type: IRA	›
SEP (Mark) Type: IRA	›

Advice | Snap Shot | Review | Share

Screen 2: Account Edit

< Account Save

Name

Owner ↓

Type ↓

Current Value

Advice | Snap Shot | Review | Share

Screen 3: Account Detail

< Account Edit

Account Name:
Retirement 401k

Owner:
Mark

Type:
401k

Current Value:
$450,000.00

Advice | Snap Shot | Review | Share

Income Information

Income

Social Security (Mark)
Type: Social Security

Social Security (Mary)
Type: Social Security

Pension (Mark)
Type: Pension

Real Estate (Mark)
Type: Other Income

Advice   Snap Shot   Review   Share

< Income   Save

Name

Owner   ↓

Type   ↓

Estimated Income

Advice   Snap Shot   Review   Share

< Income   Edit

Account Name:
Social Security

Owner: Mark

Type: Social Security

Estimated Monthly Income:
$450.00

Advice   Snap Shot   Review   Share

Add Description.

Bucket Information

Add Description.

Screen 1

Bucket

Bucket #1
Short Term Living Expenses ›

Bucket #2
Mid Term Living Expenses ›

Bucket #3
Long Term Living Expenses ›

Advice | Snap Shot | Review | Share

Screen 2

< **Bucket** Save

Years of Income
[   ] ↓

Estimated Rate of Return
[   ] ↓

Advice | Snap Shot | Review | Share

Screen 3

< **Bucket** Edit

Years of Income:
2 Years

Estimated Rate of Return:
1%

Examples:
CD, Checking Accounts,
Savings Accounts

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