

Client Details

Name	Helen smith
Date of Birth	02/04/1960
Gender	Male
Age	59
Retirement age	65

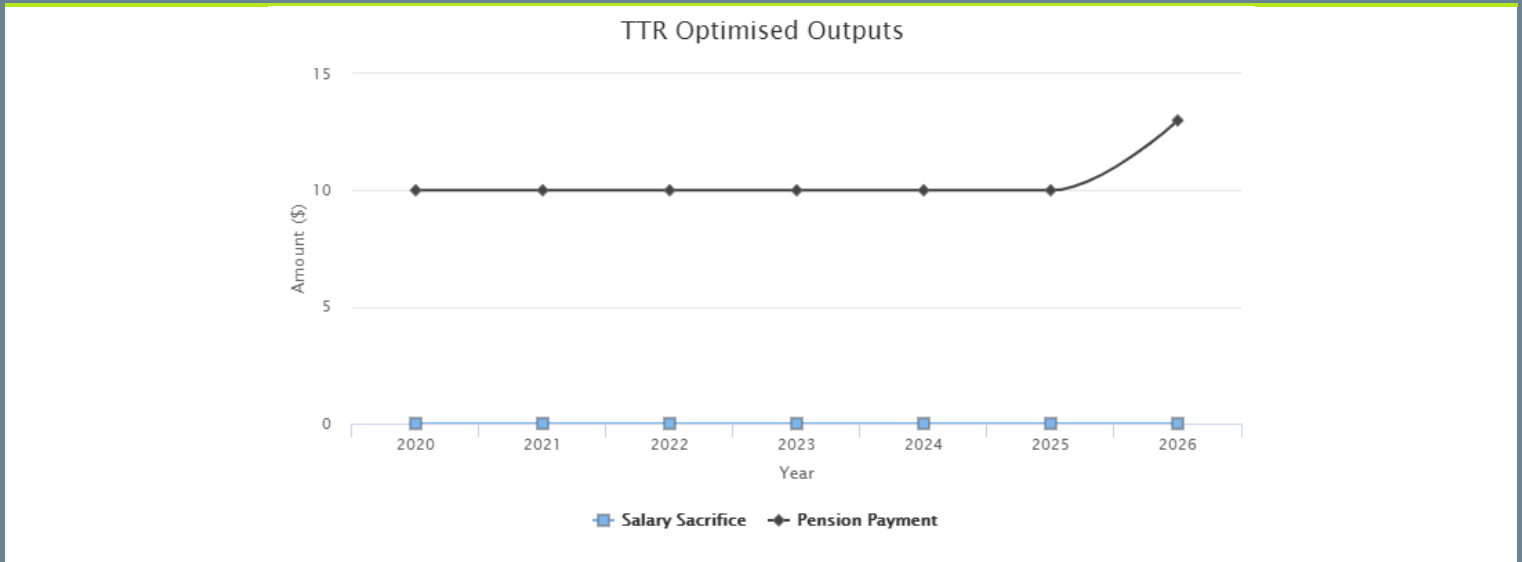
Your finances

Income per annum (excluding pension)	\$5,000.00
Risk profile	Conservative
Existing super balance	\$9,000.00
Tax-free amount (super balance)	\$248.00
Taxable amount (super balance)	\$8,752.00
Super balance to rollover to TTR pension	\$0.00
Apply pension refresh	No
Indexation type	Nil

Assumptions

Name	Value
CPI (%)	3.5%
Awote (%)	4.5%
Salary increase rate (%)	3%

TTR Optimised Outputs

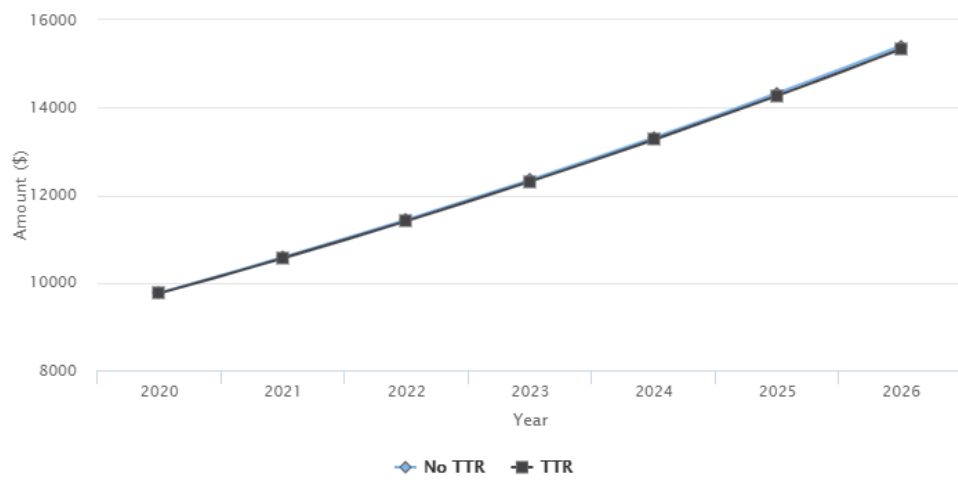


TTR Optimisation Outcomes

Age	Year	Super Guarantee	Salary Sacrifice	Pension Payment
59	2020	\$475.00	\$0.00	\$10.00
60	2021	\$489.00	\$0.00	\$10.00
61	2022	\$504.00	\$0.00	\$10.00
62	2023	\$519.00	\$0.00	\$10.00
63	2024	\$535.00	\$0.00	\$10.00
64	2025	\$551.00	\$0.00	\$10.00
65	2026	\$567.00	\$0.00	\$13.00

Comparison Of Net Worth

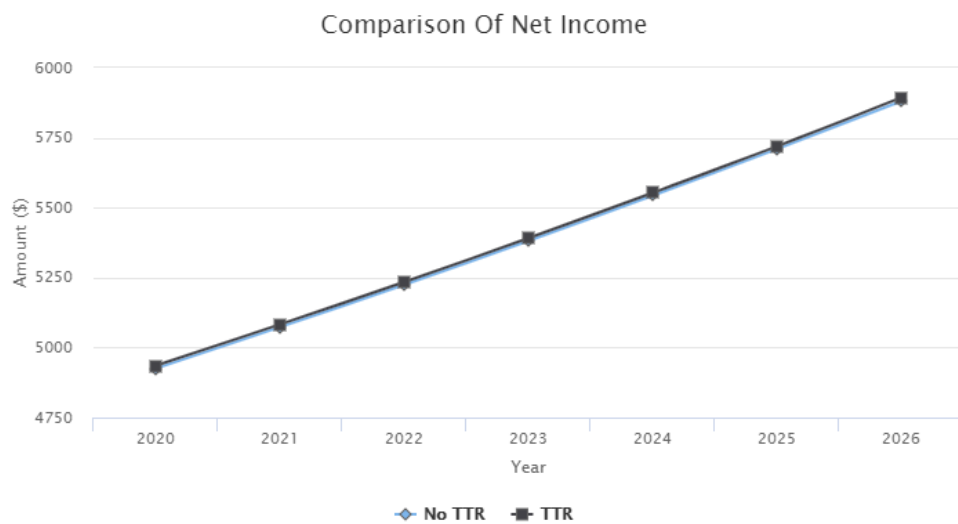
Comparison Of Net Worth



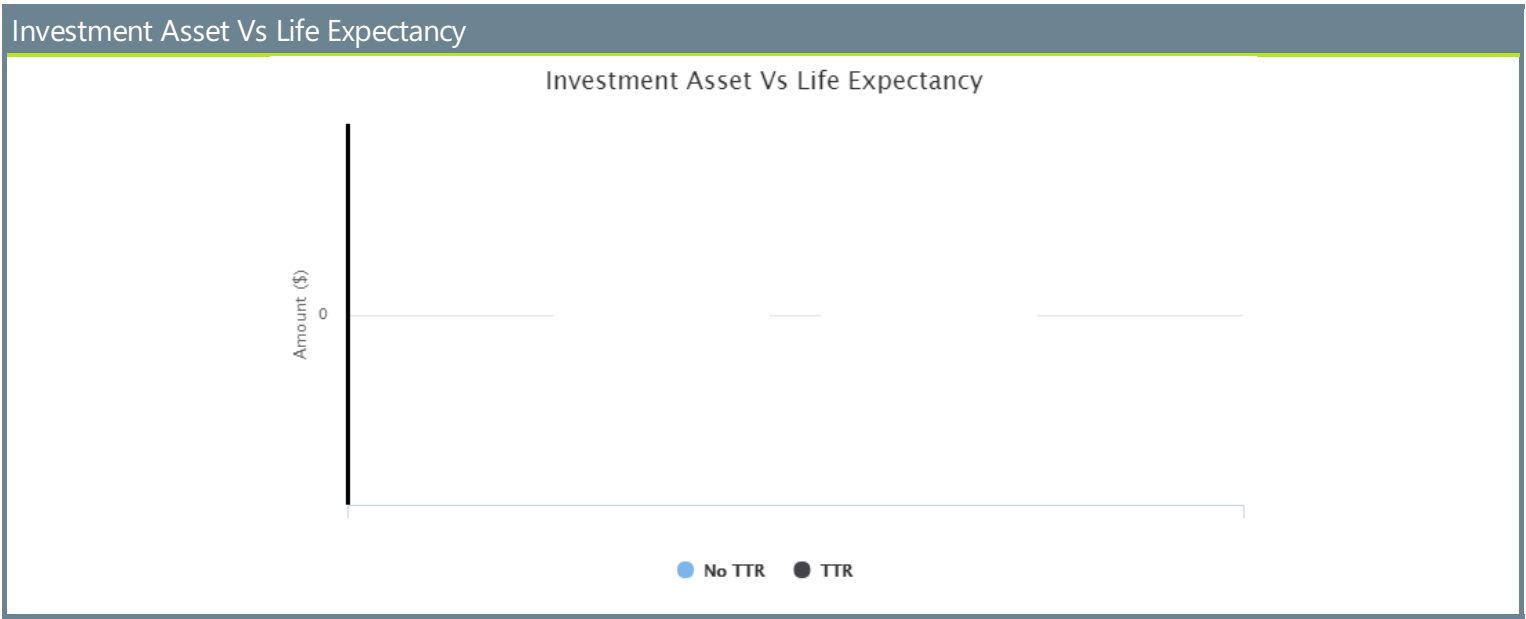
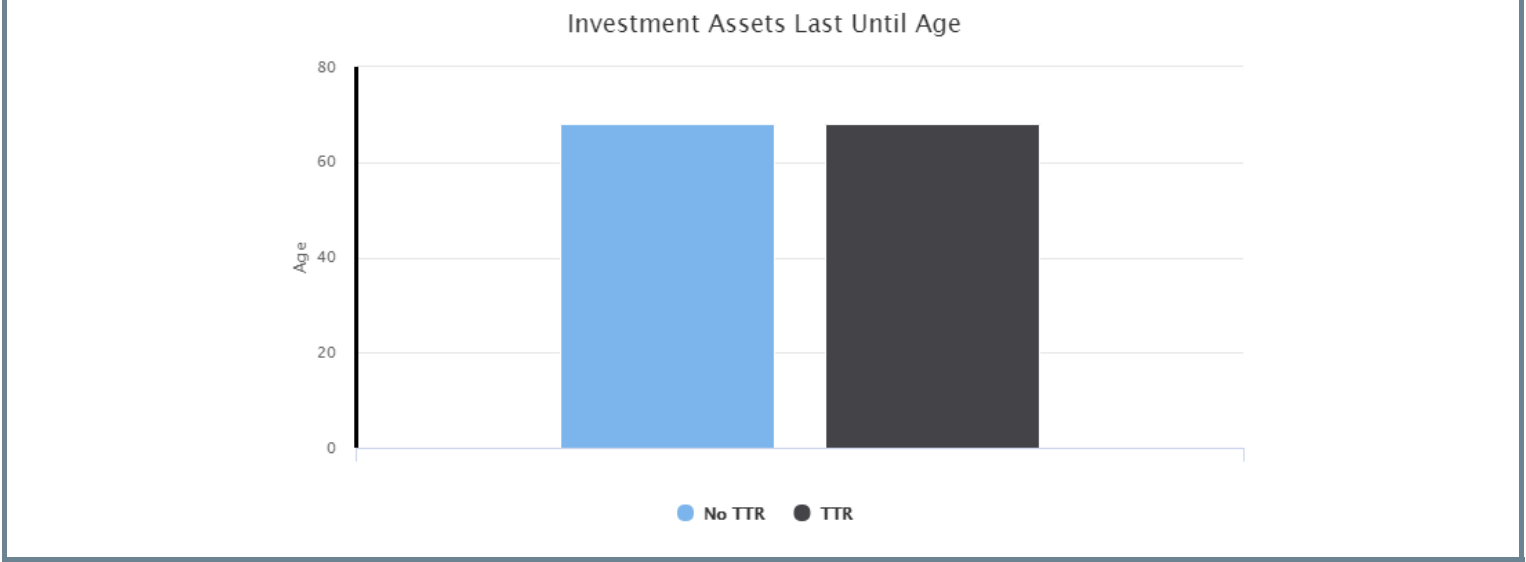
Comparison Of Tax



Comparison Of Net Income



Investment Asset Vs Age



Comparison of Asset Longevity			
	No TTR	TTR	Difference
Investment Assets Last Until Age	68 years	68 years	0 years
Investment Assets at Life Expectancy	\$0.00	\$0.00	\$0.00

About Tool

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