

Snapshot

Probability of success of Proposed plan



\$398.95k

Net worth

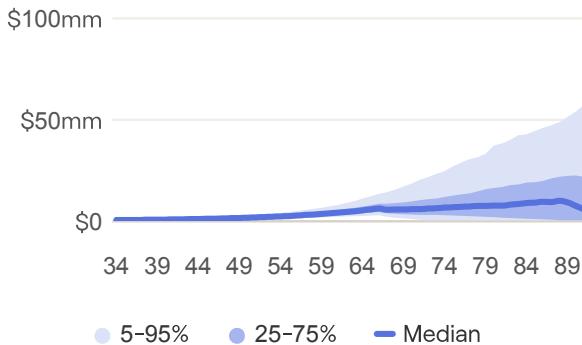
8.8%

Effective federal tax rate

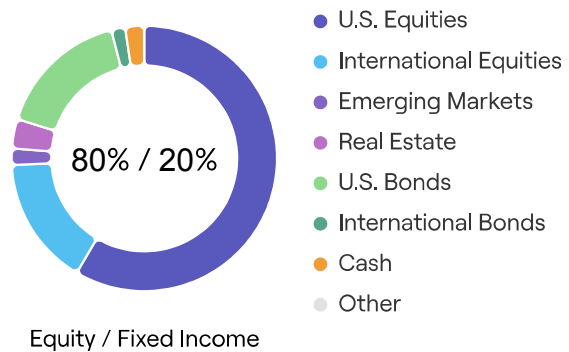
Balance Sheet

Bank	\$37,000
Invested assets	\$144,695
Real estate assets	\$400,000
Life insurance cash value	\$3,500
Other assets	\$6,256
Credit cards	\$7,500
Mortgages	\$175,000
Home equities	\$0
Student loans	\$10,000
Other debts	\$0
Net worth	\$398,951

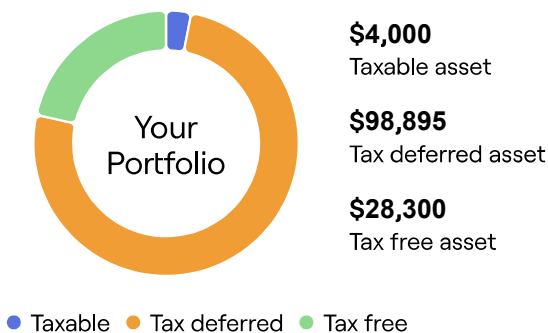
Asset simulation results of Proposed plan



Current allocation



Tax allocation summary



Tasks

- Take a vacation!
- Consolidate Retirement Accounts
- Increase Miles' 401(k) savings from 8% to 10%
- Increase 529 funding from \$100/month to ...

21.0%

Savings rate

14.67%

Withdrawal rate