




Investment Plan Example Result Summary for John and Ann

Results	Current Scenario	Recommended Scenario	
Likelihood of Funding All Goals	 <p>Probability of Success: 66% Below Confidence Zone*</p>	 <p>Probability of Success: 76% In Confidence Zone*</p>	
 Confidence Zone (70% - 85%)			
	Current Scenario	Recommended	Changes in Value
Retirement			
John	65 in 2020	65 in 2020	
Ann	65 in 2020	65 in 2020	
Goals			
Total Spending for Life of Plan	\$3,002,600	\$2,890,100	Decreased 4%
Savings			
Total Savings This Year	\$29,000	\$29,000	
Investments			
Portfolio Value	\$970,000	\$970,000	
Allocation Before Retirement	Current	Balanced II	16% Less Stock
Allocation During Retirement	Current	Balanced II	16% Less Stock
Inflation	3.00%	3.00%	

* The Confidence Zone is the range of probabilities that you and your advisor select as your target range for the Probability of Success result in your Plan. Source: Money Guide Pro