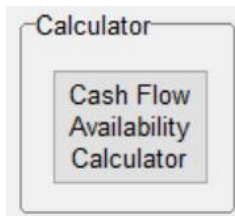## Data Entry re Additional Cash Flow
Data Entry re Proposed Life Insurance Inside the Estate

Data Entry re the Additional Cash Flow

Wealthy and Wise® includes a Cash Flow Availability Calculator located in any of the dropdowns on the Desired Cash Flow tab.

This Calculator allows you to designate a reduced level of net worth in order to accommodate additional after tax cash flow for a variety of reasons: college funding, premiums for long-term care policies, premiums for disability income policies, additional retirement funds, gifts to heirs, etc. You can also include indexing as an inflation offset in any of them. As you might expect, the Calculator is dependent on available liquid assets. If there are insufficient liquid assets to meet your data input requirements, the Calculator will indicate the amount of additional cash flow that can be produced.

Important Note: If you use the Calculator, be certain to read the Thumbtack at the top left of the Calculator before proceeding. You'll be glad you did.

Important Note: A result determined by the Cash Flow Availability Calculator is not intended to be a recommendation. It is solely a calculation that provides you a sense of additional cash flow based on your data input. Under no circumstances should you design a Scenario that utilizes all or any part of an amount indicated by the Calculator that reduces net worth or liquid assets to a level that is unacceptable to a client.

Data Entry re Proposed Life Insurance Inside the Estate

If you want a client's assets to be used for premium payments, enter policy cash value, loans and/or withdrawals, and death benefit data on the Other Assets tab / Assets Inside the Estate / Proposed Life Insurance. If you have a link to carrier data, you can import that policy data in that location; otherwise, cut and paste it from a pdf of the illustration, or hand enter it.
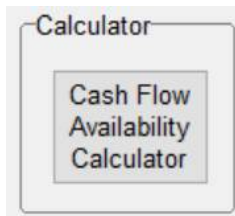
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