



Below is a view of the Workbook Main Window from Wealthy and Wise for Blog #148.

Client Workbook Edit Tools Options Help

Documents On A Disk Bob's Blog

Edit Client Data This Workbook contains stored reports for: Blog #148

Scenarios

For the columns below, display values for client age: 94

Scenario Storage Name	Scenario Title	Net Worth	Taxable Estate	Wealth To Charity	Wealth To Heirs	Liquid Assets
Retirement Plan #1 with Term	Retirement Plan #1 with Term	\$3,009,841	\$3,009,841	\$0	\$1,963,256	\$3,009,841
Retirement Plan #2 with IUL	Retirement Plan #2 with IUL	\$13,129,673	\$13,281,932	\$0	\$11,185,675	\$12,138,132

Comparisons

Comparison Storage Name	Comparison Title	Scenario #1 Description	Scenario #2 Description	Scenario #3 Description
Compare Strategies #1	Term Plus an Equity Account vs	Retirement Plan #1 with Term	Retirement Plan #2 with IUL	

Storage names can be edited on this screen by single-clicking the selected storage name.

Preview or Print Client Presentation...

Term insurance plus an equity side fund (total funding of \$20,000 a year for 30 years) is compared to the same \$20,000 funding Indexed Universal Life. The comparison is integrated within an overall retirement analysis for Bill and Jodie Robinson extending from their current ages of 35 to 95.

Note: Contact Julie Nayeri at InsMark (julien@insmark.com) or 888-InsMark (467-6275) to license Wealthy and Wise.