

Financial Analysis: Strategy 1 vs. Strategy 2 vs. Strategy 3

Presented By: [Licensed user's name appears here]

For: Tony Jamison & Allison Jamison

Comparison of Alternatives

Year	M/F Ages	Effect on Spendable Cash Flow			Effect on Net Worth*			Effect on Wealth to Heirs		
		Strategy 1	Strategy 2	Strategy 3	Strategy 1	Strategy 2	Strategy 3	Strategy 1	Strategy 2	Strategy 3
1	45/45	0	0	0	2,424,416	2,435,281	2,296,026	2,573,181	2,597,883	4,504,392
2	46/46	0	0	0	2,592,772	2,614,959	2,401,569	2,741,378	2,792,336	4,620,038
3	47/47	0	0	0	2,780,328	2,814,342	2,523,077	2,928,585	3,007,472	4,756,736
4	48/48	0	0	0	2,983,664	3,030,048	2,657,025	3,131,368	3,239,970	4,911,646
5	49/49	0	0	0	3,201,306	3,260,640	2,801,802	3,348,238	3,488,457	5,083,821
6	50/50	0	0	0	3,432,803	3,505,702	2,956,804	3,578,725	3,752,584	5,273,367
7	51/51	0	0	0	3,678,226	3,765,344	3,121,931	3,822,885	4,032,532	5,480,766
8	52/52	0	0	0	3,879,636	3,982,116	3,297,371	4,022,759	4,270,928	5,710,812
9	53/53	0	0	0	4,092,574	4,211,585	3,516,524	4,233,868	4,523,419	5,956,038
10	54/54	0	0	0	4,317,600	4,454,357	3,755,863	4,456,749	4,790,697	6,217,217
11	55/55	0	0	0	4,555,287	4,711,073	4,009,851	4,691,953	5,073,491	6,495,319
12	56/56	0	0	0	4,806,240	4,982,414	4,279,249	4,940,062	5,372,579	6,791,211
13	57/57	0	0	0	5,071,102	5,269,101	4,570,041	5,201,692	5,688,785	7,111,087
14	58/58	0	0	0	5,350,548	5,571,902	4,869,436	5,477,491	6,022,982	7,451,553
15	59/59	0	0	0	5,645,286	5,891,620	5,187,731	5,768,138	6,376,088	7,813,836
16	60/60	0	0	0	6,044,055	6,390,128	5,808,395	6,074,363	6,749,086	8,199,065
17	61/61	0	0	0	6,376,909	6,759,304	6,192,807	6,396,927	7,143,003	8,608,686
18	62/62	0	0	0	6,727,766	7,148,964	6,601,501	6,736,640	7,558,939	9,044,357
19	63/63	0	0	0	7,097,534	7,560,170	7,036,202	7,094,358	7,998,050	9,507,920
20	64/64	0	0	0	7,487,173	7,994,046	7,498,248	7,470,981	8,461,557	10,000,839
21	65/65	360,000	360,000	360,000	7,490,635	8,024,160	7,934,833	7,473,483	8,519,394	10,462,924
22	66/66	367,200	367,200	367,200	7,495,480	8,057,455	8,016,916	7,477,310	8,582,057	10,572,157
23	67/67	374,544	374,544	374,544	7,487,380	8,084,745	8,113,243	7,468,133	8,640,456	9,099,610
24	68/68	382,035	382,035	382,035	7,470,014	8,103,538	8,206,568	7,449,625	8,692,202	9,229,299
25	69/69	389,676	389,676	389,676	7,442,771	8,114,537	8,299,888	7,421,173	8,738,109	9,359,021
26	70/70	397,469	397,469	397,469	7,331,223	8,043,789	8,353,514	7,309,180	8,680,231	9,427,987
27	71/71	405,418	405,418	405,418	7,202,467	7,958,115	8,404,986	7,179,997	8,606,857	9,454,856
28	72/72	413,527	413,527	413,527	7,055,218	7,856,365	8,454,322	7,032,346	8,516,733	9,471,252
29	73/73	421,797	421,797	421,797	6,888,115	7,737,306	8,501,598	6,864,867	8,408,513	9,476,292
30	74/74	430,233	430,233	430,233	6,699,710	7,599,624	8,546,966	6,676,118	8,280,759	9,469,072
31	75/75	438,838	438,838	438,838	6,488,457	7,441,916	8,590,694	6,464,558	8,131,935	9,448,679
32	76/76	447,615	447,615	447,615	6,252,725	7,262,694	8,631,493	6,228,559	7,960,407	9,516,191
33	77/77	456,567	456,567	456,567	5,993,568	7,061,433	8,669,150	5,753,917	7,695,491	9,580,679
34	78/78	465,698	465,698	465,698	5,706,242	6,837,432	8,703,458	5,141,231	7,197,940	9,641,700
35	79/79	475,012	475,012	475,012	5,258,645	6,585,481	8,734,163	4,573,950	6,652,625	9,699,073
36	80/80	484,513	484,513	484,513	4,535,236	6,303,532	8,760,986	4,136,550	6,056,331	9,752,430
37	81/81	494,203	494,203	494,203	3,747,785	5,989,404	8,783,476	3,658,599	5,405,641	9,801,221
38	82/82	140,150	504,087	504,087	3,592,959	5,481,713	8,801,228	3,592,959	4,820,649	9,844,940
39	83/83	0	514,169	514,169	3,696,191	4,706,658	8,813,766	3,696,191	4,352,995	9,882,994
40	84/84	0	524,452	524,452	3,802,748	3,863,041	8,820,440	3,802,748	3,841,938	9,914,605
		7,344,495	8,747,053	8,747,053						

The values highlighted in red indicate the liquid assets are not sufficient to meet the cash flow requirements in the years shown.

*After providing spendable cash flow.

Values on this page may include non-guaranteed life insurance values. If so, actual results are likely to vary, and this report is not valid unless accompanied by a life insurance basic illustration that details non-guaranteed and guaranteed elements.

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		Strategy 1	Strategy 2	Strategy 3	Strategy 1	Strategy 2	Strategy 3	Strategy 1	Strategy 2	Strategy 3
41	85/85	0	33,161	534,941	3,912,719	3,912,719	8,820,499	3,912,719	3,912,719	9,914,121
42	86/86	0	0	545,640	4,026,193	4,026,193	8,810,970	4,026,193	4,026,193	9,896,611
43	87/87	0	0	556,553	4,143,268	4,143,268	8,789,790	4,143,268	4,143,268	9,864,651
44	88/88	0	0	567,684	4,264,040	4,264,040	8,754,523	4,264,040	4,264,040	9,815,492
45	89/89	0	0	579,037	4,388,611	4,388,611	8,702,541	4,388,611	4,388,611	9,746,181
46	90/90	0	0	590,618	4,517,087	4,517,087	8,630,523	4,517,087	4,517,087	9,653,013
47	91/91	0	0	602,431	4,649,577	4,649,577	8,550,511	4,649,577	4,649,577	9,411,750
48	92/92	0	0	614,479	4,786,193	4,786,193	8,466,795	4,786,193	4,786,193	9,145,545
49	93/93	0	0	626,769	4,927,051	4,927,051	8,386,108	4,927,051	4,927,051	8,859,008
50	94/94	0	0	639,304	5,072,270	5,072,270	8,317,816	5,072,270	5,072,270	8,558,946

7,344,495 8,780,214 14,604,509

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