

Prioritize the Use of Liquid Assets with InsMark's Wealthy and Wise®

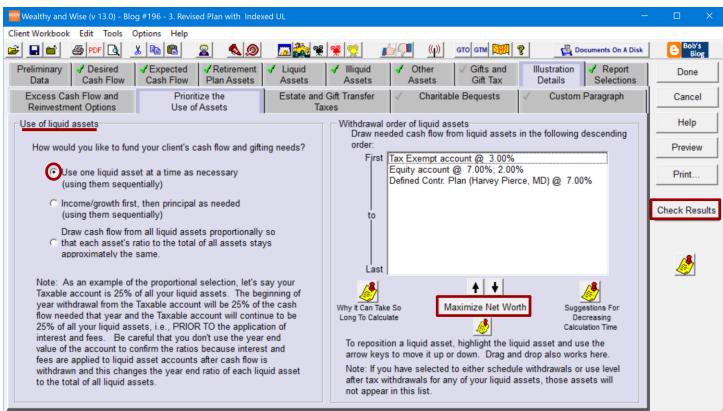
Prioritize the Use of Liquid Assets

Each item under the "Use of liquid assets" in the image below is how Wealthy and Wise determines the calculation logic of your client's liquid asset data. The choice with the red circle generally produces the most efficient use of liquid assets. Be sure that each prompt in a given Workbook is consistent (unless you want different calculation logic from scenario to scenario). You must click "Maximize Net Worth" (outlined with a red box below) for the System's algorithm to take effect.

Use Check Results (also outlined with a red box below) to determine the effect of your selection on net worth quickly.



The four thumbtacks provide you with additional information.



<u>Click here</u> to review Blog #104 by Bob Ritter (InsMark's President, CEO, and Founder). It includes a video that examines Good Logic vs. Bad Logic® as it relates to the best order of liquidating assets for the most efficient, after-tax, retirement cash flow.

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