

Income for Life Report

Report scenario is **Bob Anderson dies at age 70**

09/12/2017

| Year | Bob Age | Sally Age | Bob Anderson Social Security | Sally Anderson Social Security | Bob Anderson Pension | Total |
|------|---------|-----------|------------------------------|--------------------------------|----------------------|----------|
| 2017 | 67 | 67 | \$20,400 | \$14,400 | \$30,000 | \$64,800 |
| 2018 | 68 | 68 | \$20,808 | \$14,688 | \$30,000 | \$65,496 |
| 2019 | 69 | 69 | \$21,224 | \$14,982 | \$30,000 | \$66,206 |
| 2020 | 70 | 70 | \$21,649 | \$0 | \$15,000 | \$36,649 |
| 2021 | 71 | 71 | \$22,082 | \$0 | \$15,000 | \$37,082 |
| 2022 | 72 | 72 | \$22,523 | \$0 | \$15,000 | \$37,523 |
| 2023 | 73 | 73 | \$22,974 | \$0 | \$15,000 | \$37,974 |
| 2024 | 74 | 74 | \$23,433 | \$0 | \$15,000 | \$38,433 |
| 2025 | 75 | 75 | \$23,902 | \$0 | \$15,000 | \$38,902 |
| 2026 | 76 | 76 | \$24,380 | \$0 | \$15,000 | \$39,380 |
| 2027 | 77 | 77 | \$24,867 | \$0 | \$15,000 | \$39,867 |
| 2028 | 78 | 78 | \$25,365 | \$0 | \$15,000 | \$40,365 |
| 2029 | 79 | 79 | \$25,872 | \$0 | \$15,000 | \$40,872 |
| 2030 | 80 | 80 | \$26,390 | \$0 | \$15,000 | \$41,390 |
| 2031 | 81 | 81 | \$26,917 | \$0 | \$15,000 | \$41,917 |
| 2032 | 82 | 82 | \$27,456 | \$0 | \$15,000 | \$42,456 |
| 2033 | 83 | 83 | \$28,005 | \$0 | \$15,000 | \$43,005 |
| 2034 | 84 | 84 | \$28,565 | \$0 | \$15,000 | \$43,565 |
| 2035 | 85 | 85 | \$29,136 | \$0 | \$15,000 | \$44,136 |
| 2036 | 86 | 86 | \$29,719 | \$0 | \$15,000 | \$44,719 |

Legal Disclaimer

The Retire Now Income for Life provides no guarantees. Investment information provided is based on recent statements or information provided by the investment companies and the information is believed to accurately reflect the value of the most recent statement only. Information provided by the customer is used for analysis purposes, and the Retire Now Income for Life Plan relies on this information for accuracy. The Client Investment Illustration does not attempt to provide real future values. Rates of return are simple un-audited calculations used for analysis purposes only and are not guaranteed. Rates of return used are averages, and they are based on your financial objectives, risk tolerance, current financial status, and investment time frame. The redeemed value of investments and insurance products may be less if an account is liquidated due to commissions, fees, surrender charges, market fluctuations, or other adjustments associated with the terms of the investment product or insurance contract. Income, dividends, insurance credits, and investment distribution projections are approximate and are not guaranteed. This is not an official statement or confirmation. Please seek other professionals for specific tax or legal advice. The numbered asset corresponding to each income column is not necessarily guaranteed to produce the income amount shown. Securities Offered Through NA Member FINRA & SIPC. Advisory Services offered through NA, an SEC Registered Investment Advisor

Bob Anderson

Client Name

Initials

Rep/Agent

Initials

| Year | Bob Age | Sally Age | Bob Anderson Social Security | Sally Anderson Social Security | Bob Anderson Pension | Total |
|------|---------|-----------|------------------------------|--------------------------------|----------------------|----------|
| 2037 | 87 | 87 | \$30,313 | \$0 | \$15,000 | \$45,313 |
| 2038 | 88 | 88 | \$30,920 | \$0 | \$15,000 | \$45,920 |
| 2039 | 89 | 89 | \$31,538 | \$0 | \$15,000 | \$46,538 |
| 2040 | 90 | 90 | \$32,169 | \$0 | \$15,000 | \$47,169 |
| 2041 | 91 | 91 | \$32,812 | \$0 | \$15,000 | \$47,812 |
| 2042 | 92 | 92 | \$33,468 | \$0 | \$15,000 | \$48,468 |
| 2043 | 93 | 93 | \$34,138 | \$0 | \$15,000 | \$49,138 |
| 2044 | 94 | 94 | \$34,820 | \$0 | \$15,000 | \$49,820 |
| 2045 | 95 | 95 | \$35,517 | \$0 | \$15,000 | \$50,517 |
| 2046 | 96 | 96 | \$36,227 | \$0 | \$15,000 | \$51,227 |

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