

Strategy 1				
Year	Jeff		Jane	
	Age	Income	Age	Income
2020	67	\$ 2,700	66	\$ 1,600
2021	68	\$ 2,741	67	\$ 1,624
2022	69	\$ 2,782	68	\$ 1,648
2023	70	\$ 2,823	69	\$ 1,673
2024	71	\$ 2,866	70	\$ 1,698
2025	72	\$ 2,909	71	\$ 1,724
2026	73	\$ 2,952	72	\$ 1,750
2027	74	\$ 2,997	73	\$ 1,776
2028	75	\$ 3,042	74	\$ 1,802
2029	76	\$ 3,087	75	\$ 1,829
2030	77	\$ 3,133	76	\$ 1,857
2031	78	\$ 3,180	77	\$ 1,885
2032	79	\$ 3,228	78	\$ 1,913
2033	80	\$ 3,277	79	\$ 1,942

Strategy 2				
Year	Jeff		Jane	
	Age	Income	Age	Income
2020	67	\$ 800	66	\$ 1,600
2021	68	\$ 812	67	\$ 1,624
2022	69	\$ 824	68	\$ 1,648
2023	70	\$ 3,451	69	\$ 1,673
2024	71	\$ 3,502	70	\$ 1,698
2025	72	\$ 3,555	71	\$ 1,724
2026	73	\$ 3,608	72	\$ 1,750
2027	74	\$ 3,662	73	\$ 1,776
2028	75	\$ 3,717	74	\$ 1,802
2029	76	\$ 3,773	75	\$ 1,829
2030	77	\$ 3,830	76	\$ 1,857
2031	78	\$ 3,887	77	\$ 1,885
2032	79	\$ 3,946	78	\$ 1,913
2033	80	\$ 4,005	79	\$ 1,942

2031	Straight Breakeven (SS only)			
78	77	84		
2035	Breakeven w/Growth on \$ difference			
82	81	99		

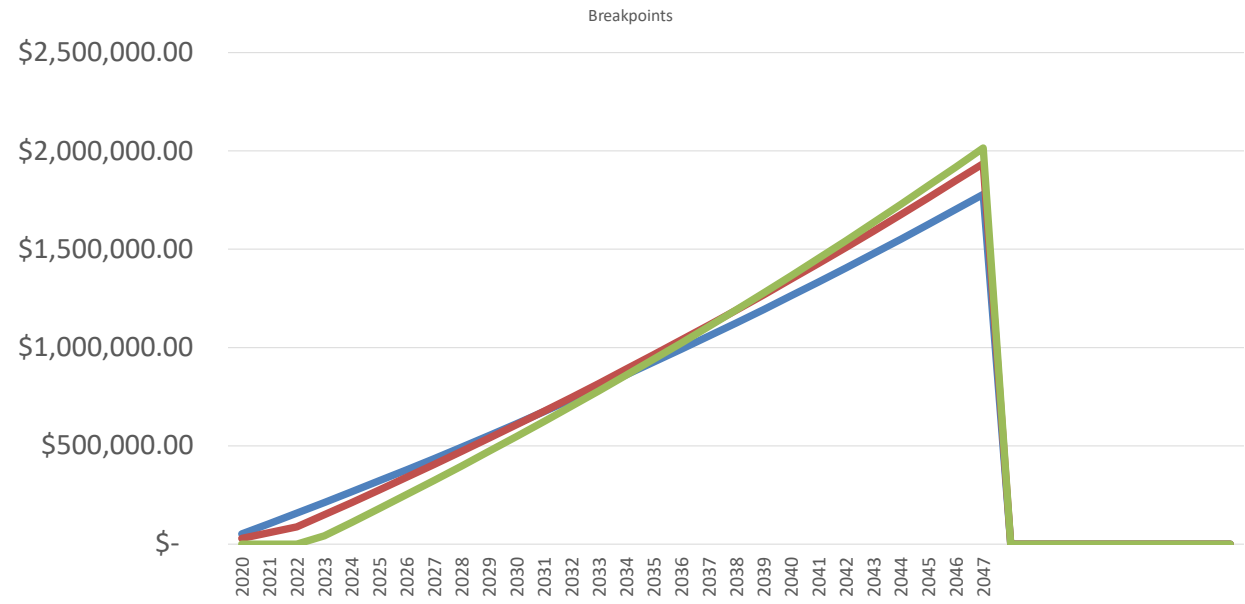
Strategy 3				
Year	Jeff		Jane	
	Age	Income	Age	Income
2020	67	\$ -	66	\$ -
2021	68	\$ -	67	\$ -
2022	69	\$ -	68	\$ -
2023	70	\$ 3,451	69	\$ -
2024	71	\$ 3,502	70	\$ 2,242
2025	72	\$ 3,555	71	\$ 2,275
2026	73	\$ 3,608	72	\$ 2,309
2027	74	\$ 3,662	73	\$ 2,344
2028	75	\$ 3,717	74	\$ 2,379
2029	76	\$ 3,773	75	\$ 2,415
2030	77	\$ 3,830	76	\$ 2,451
2031	78	\$ 3,887	77	\$ 2,488
2032	79	\$ 3,946	78	\$ 2,525
2033	80	\$ 4,005	79	\$ 2,563

2038	Straight Breakeven (SS only)			
85	84	99		
2053	Breakeven w/Growth on \$ difference			
100	99			



## Social Security Strategy Analysis

Jeff and Jane



## STRATEGY TOTALS

	Strategy 1	Strategy 2	Strategy 3
Breakpoint One 2031	\$ 672,927	\$ 675,466	\$ 622,678
Breakpoint Two 2038	\$ 1,124,711	\$ 1,190,290	\$ 1,191,295
Life Expectancy 2047	\$ 1,779,244	\$ 1,936,154	\$ 2,015,094
Net Present Value assuming ROR of 5%	\$ 903,687	\$ 946,894	\$ 936,144

This table is based on your responses to the client profile. The figures represented in the table are not a prediction and they are not guaranteed. There are many conditions that could alter the true cash flow outcomes. Some, but not all of these include a difference between actual and projected Social Security cost of living adjustments, a difference between actual and projected expense inflation, a difference between your reported and actual effective tax rate.

This does not constitute tax advice. You should consult a tax advisor for specific tax questions. Capita Financial Network LLC does not provide tax, legal, or accounting advice. Certain performance calculations are prepared internally and have not been audited or verified by a third party. The use of a different methodology for preparing, calculating or presenting performance returns may lead to different results and such differences may be material.

This table is designed to simply sum up how much money you have told us you will need. It does not make guarantee that these amounts will be available to you as income. Your retirement income available may be subject to many other factors including, but not limited to, investment gain and loss, changes in tax rates, and changes in your income needs over time.

We strongly recommend that you regularly review your income needs and make adjustments over time as needed based on changes in the retirement landscape.

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