

# Retirement Income Projection



for

## Sample Employee

11/9/2019

Retirement Planning Inputs	
Your Current Annual Pay	\$50,000
Contribution Percentage	5.00% \$2,500
Employer Contribution	5.00% \$2,500
Current Retirement Savings	\$45,000
Annual Social Security, Est. *	\$22,000
Current Age	28
Retirement Age	65

Retirement Projections - Estimated		Retirement Income Score: % of Target		
Age 65 Balance:	\$1,024,965		<b>83%</b>	
Age 65 Income:*	\$104,034			
Retirement Income:*	\$73,248			
Target Retirement Income:*	\$88,429			

\* Income adjusted for 2% inflation. Retirement income estimate is age 65 assets x 5% + estimated Soc-Sec. Target income is 85% of income. Assumed portfolio return is 6%. Projections are only an estimate and not a guarantee of future performance..

What if?	Retirement Balance	Retirement Income	Score
Increased Savings Rate by 2%:	\$1,152,233	\$79,612	<b>90%</b>
Increased Retirement Age by 3 years:	\$1,236,667	\$83,833	<b>95%</b>
Increase Savings and Retirement Age:	\$1,391,429	\$91,571	<b>104%</b>

Investment advice and financial planning offered through Park + Elm Investment Adviser, LLC, a registered investment advisor, DBA ClearPoint Financial Partners. Park + Elm LLC and ClearPoint Financial Partners are separate entities.

\* Social Security Estimate was obtained through the Social Security Administration Website, based on age 65 retirement & current annual salary and is not a guarantee of future benefits.