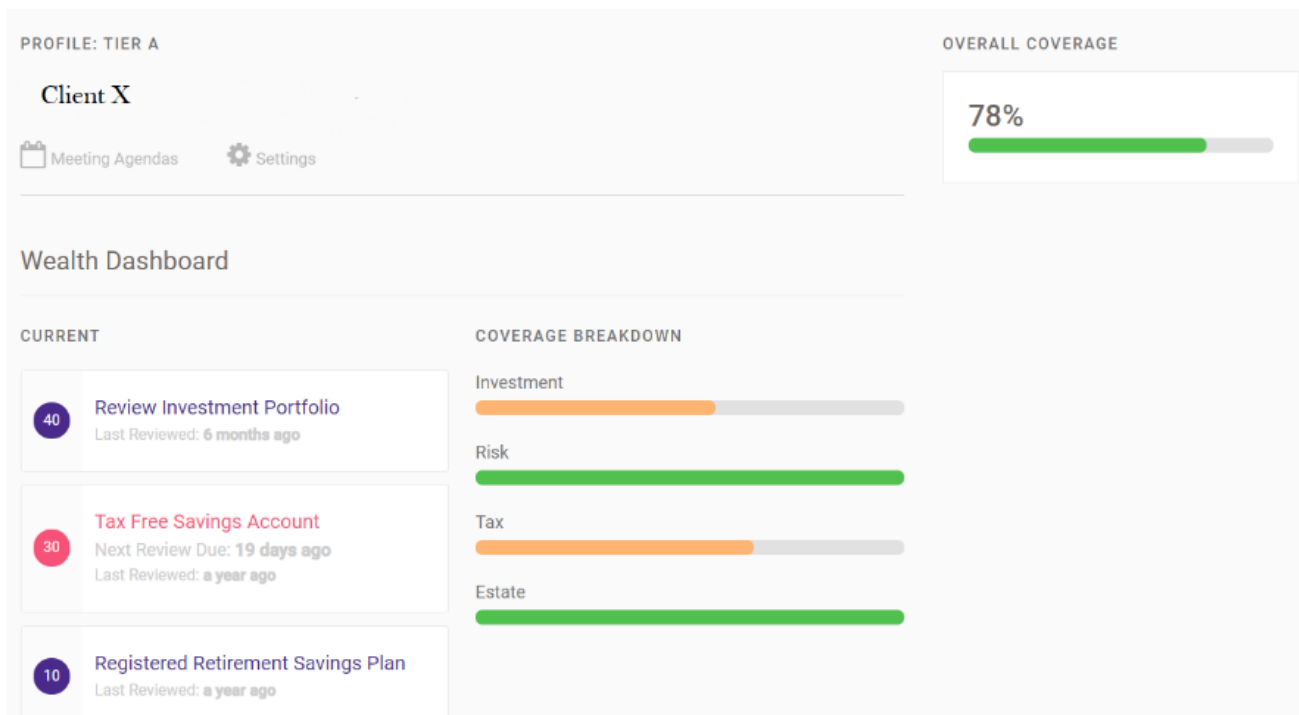


Family and Wealth Profile



Wealth Dashboard

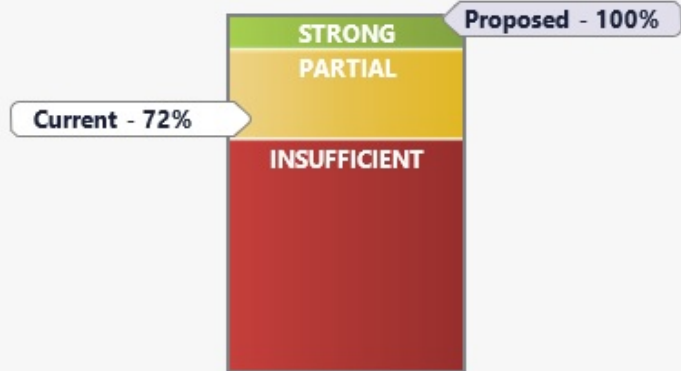


Retirement Goal Progress

This report shows progress towards the retirement goal. That is, your ability to cover expenses, pay taxes, and maintain discretionary spending during your retirement. The chart to the right compares your current situation to the proposed scenario.

The table below contains a comparison of assumptions, needs, and other goals in both the current situation and in all other situations.

RETIREMENT GOAL COVERAGE



Assumptions	Current Plan	Wealth Stewards Plan
Retirement Age - John / Jane	62 (2033) / 59 (2033)	65 (2036) / 62 (2036)
Life Expectancy - John / Jane	100 (2071) / 100 (2074)	100 (2071) / 100 (2074)
Inflation Rate	2.00%	2.00%
Assets Funding Retirement*	\$1,792,000	\$1,792,000
Current Monthly Savings	\$1,000	\$3,000
Investment Management Fees	2.48%	1.50%
Retirement Rate of Return (Gross)	5.12%	5.70%
Plan Overview		
Net Worth at Retirement	\$11,113,443	\$12,594,476
Net Worth at Plan End	\$15,852,387	\$16,013,848
Year of First Shortfall	2053	-

* = Today's Dollars