

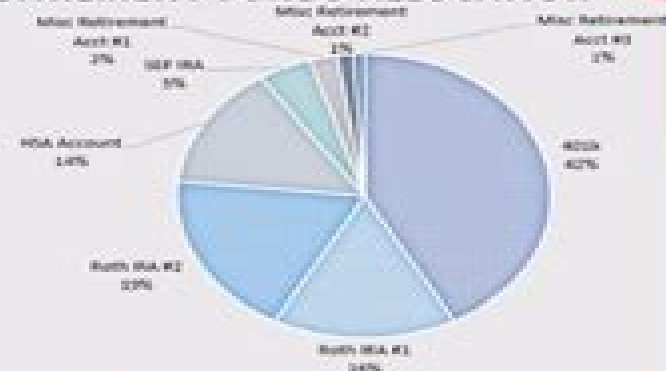
# RETIREMENT PLANNER



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## RETIREMENT FUNDS ALLOCATION



Retirement Accounts			
Account Name	Current Balance	Annual Return	Monthly Deposit
401k	45,000.00	10%	500.00
Roth IRA #1	17,000.00	8%	100.00
Roth IRA #2	20,000.00	6%	50.00
IRA Account	15,000.00	7%	25.00
SEP IRA	5,000.00	4%	25.00
Misc Retirement Acct #1	2,500.00	22%	15.00
Misc Retirement Acct #2	1,500.00	13%	10.00
Misc Retirement Acct #3	1,000.00	5%	100.00
Current Balance	107,000.00	9%	425.00
Left to Save	1,893,000.00		

Retirement Investment Estimates				
Account	Balance	Int Rate	Mth Deposit	Final Balance
401k	45,000.00	10%	500.00	497,757.55
Roth IRA #1	17,000.00	8%	100.00	169,914.80
Roth IRA #2	20,000.00	6%	50.00	109,911.88
IRA Account	15,000.00	7%	25.00	85,272.63
SEP IRA	5,000.00	4%	25.00	22,592.18
Misc Retirement Acct #1	2,500.00	22%	15.00	400,833.49

Adjustable Retirement Calcul			
Account	Balance	Int Rate	Mth
401k	45,000.00	10%	
Roth IRA #1	17,000.00	8%	
Roth IRA #2	20,000.00	6%	
IRA Account	15,000.00	7%	
SEP IRA	5,000.00	4%	
Misc Retirement Acct #1	2,500.00	22%	

Budget Overview

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**Bonnie Biafore**



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