

Tt

Total Term

6

Tt Calculation

Current Net Worth

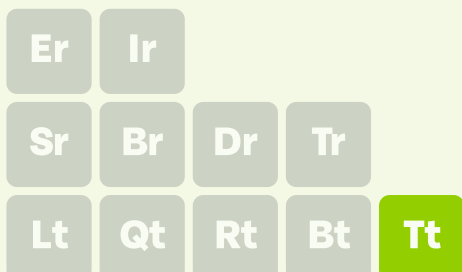
\$723,000

Estimated Annual Spending

\$120,000

Tt Explanation

Estimates the number of years you could live on your current assets if they did not grow (ignoring inflation, taxes and fees). This includes cash, investments, business equity, and real estate equity.



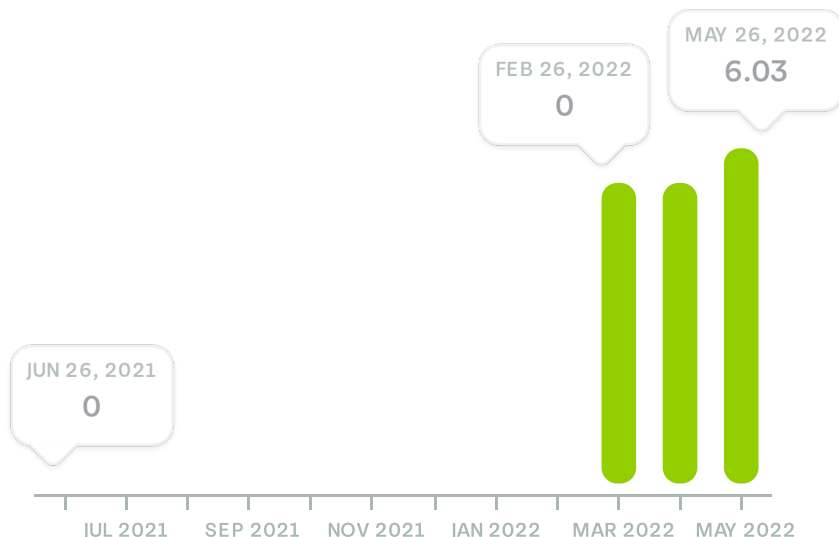
Elements

Sample Client

Total Term Performance Summary

May 26, 2022

TOTAL TERM HISTORY



Average 90-day change

Last 12 months

0.15

TOTAL TERM DETAILS



*Other includes any assets or debts not captured in other Term scores. Items may include student loans, auto loans, credit cards, personal property, etc.

RELATED TERM ELEMENTS



This tool is only intended to illustrate mathematical principles and is not intended to portray investment performance of any particular product or strategy. If you have any questions regarding tax related issues, you should consult a qualified tax professional.

The rates of return do not represent any actual investment and cannot be guaranteed. Any investment involves potential loss of principal. This illustration does not take taxes, advisory fees, commissions or other expenses into account. The analysis contained in this report is based upon information provided by you, the client. If any of the information is incorrect, you should notify your financial professional. The information provided by you should be reviewed periodically and updated when either the information or your circumstances change. This is not to be considered an official statement of your accounts. In this regard, please refer to the confirmation notices and client statements received from sponsor(s) and custodians. Past performance is not a guarantee of future results. The information displayed in this report should not be used as a primary basis for making investment decisions. Please speak to your Financial Professional prior to making investment decisions.