

Personalized Investment Strategy

Prepared on May 23, 2025

Name: **Sample Client**

Age: **60**

Planned Retirement Age: **68**

Longevity/Length of Plan: **92**

Name: **Spouse**

Age: **58**

Planned Retirement Age: **65**

Longevity/Length of Plan: **92**

Current investable assets: **\$2,600,000**

Starting annual contributions to portfolio (current dollars): **\$30,000**

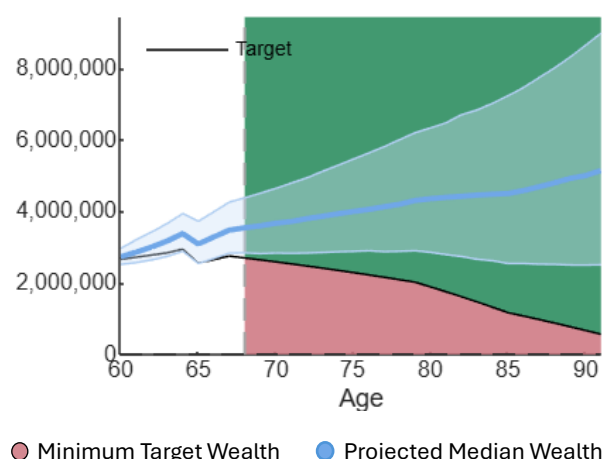
Starting withdrawal amount from portfolio at retirement age (current dollars): **\$125,000**

Behavioral loss tolerance: **-40%**

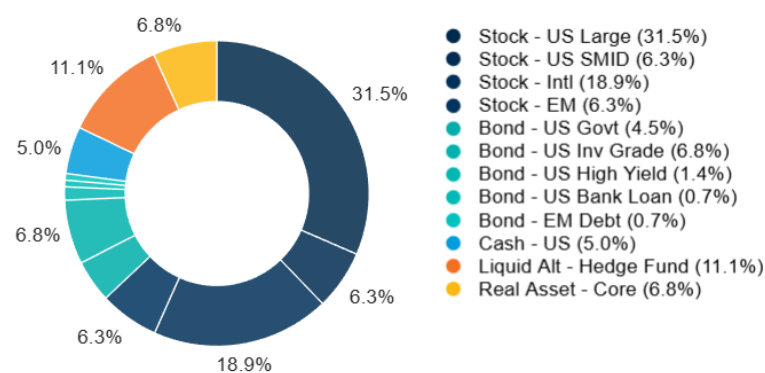
Target return objective (nominal): **5.4%**

Legacy goal (current dollars): **\$600,000**

Wealth Path Over Time Horizon



Optimal Portfolio Allocation (as of report date)



Key Statistics of Your Investment Plan

Probability of surplus (Wealth > \$0) at longevity: **95%**

Projected wealth at longevity:

5th Percentile
\$97,808

Median Wealth
\$5,139,983

75th Percentile
\$8,980,211

Potential drawdown:

Maximum drawdown
(bottom 5th percentile)
-35.1%

1-Year drawdown
(bottom 5th percentile)
-\$503,174

1-Year drawdown
(bottom 1st percentile)
-\$703,781
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