



## Retirement Distribution Analysis Using a Taxable Account

Distribution Page: 1

Presented By: [Licensed user's name appears here]

For: George Baker, MD

Date: [Current date appears here]

		Account Yield 6.00%	Retirement Income Tax Bracket 35.00%	Distribution Method Interest & Principal			
		(1)	(2)	(3)	(4)	(5)	(6)
Retirement Year	Age	Beginning of Year Value of Account	Tax Free Withdrawal of Principal	Account Balance After Withdrawal (1) - (2)	Annualized Gross Interest Earned	Annualized After Tax Interest Accrued	Year End Value of Account (3) + (5)
1	65	612,405	42,987	569,418	34,165	22,207	591,625
2	66	591,625	42,987	548,638	32,918	21,397	570,035
3	67	570,035	42,987	527,048	31,623	20,555	547,603
4	68	547,603	42,987	504,616	30,277	19,680	524,296
5	69	524,296	42,987	481,309	28,879	18,771	500,080
6	70	500,080	42,987	457,093	27,426	17,827	474,920
7	71	474,920	42,987	431,933	25,916	16,845	448,778
8	72	448,778	42,987	405,791	24,347	15,826	421,617
9	73	421,617	42,987	378,630	22,718	14,767	393,397
10	74	393,397	42,987	350,410	21,025	13,666	364,076
11	75	364,076	42,987	321,089	19,265	12,522	333,611
12	76	333,611	42,987	290,624	17,437	11,334	301,958
13	77	301,958	42,987	258,971	15,538	10,100	269,071
14	78	269,071	42,987	226,084	13,565	8,817	234,901
15	79	234,901	42,987	191,914	11,515	7,485	199,399
16	80	199,399	42,987	156,412	9,385	6,100	162,512
17	81	162,512	42,987	119,525	7,172	4,661	124,186
18	82	124,186	42,987	81,199	4,872	3,167	84,366
19	83	84,366	42,987	41,379	2,483	1,614	42,993
20	84	42,993	42,987	6	0	0	6
			859,740		380,526	247,341	

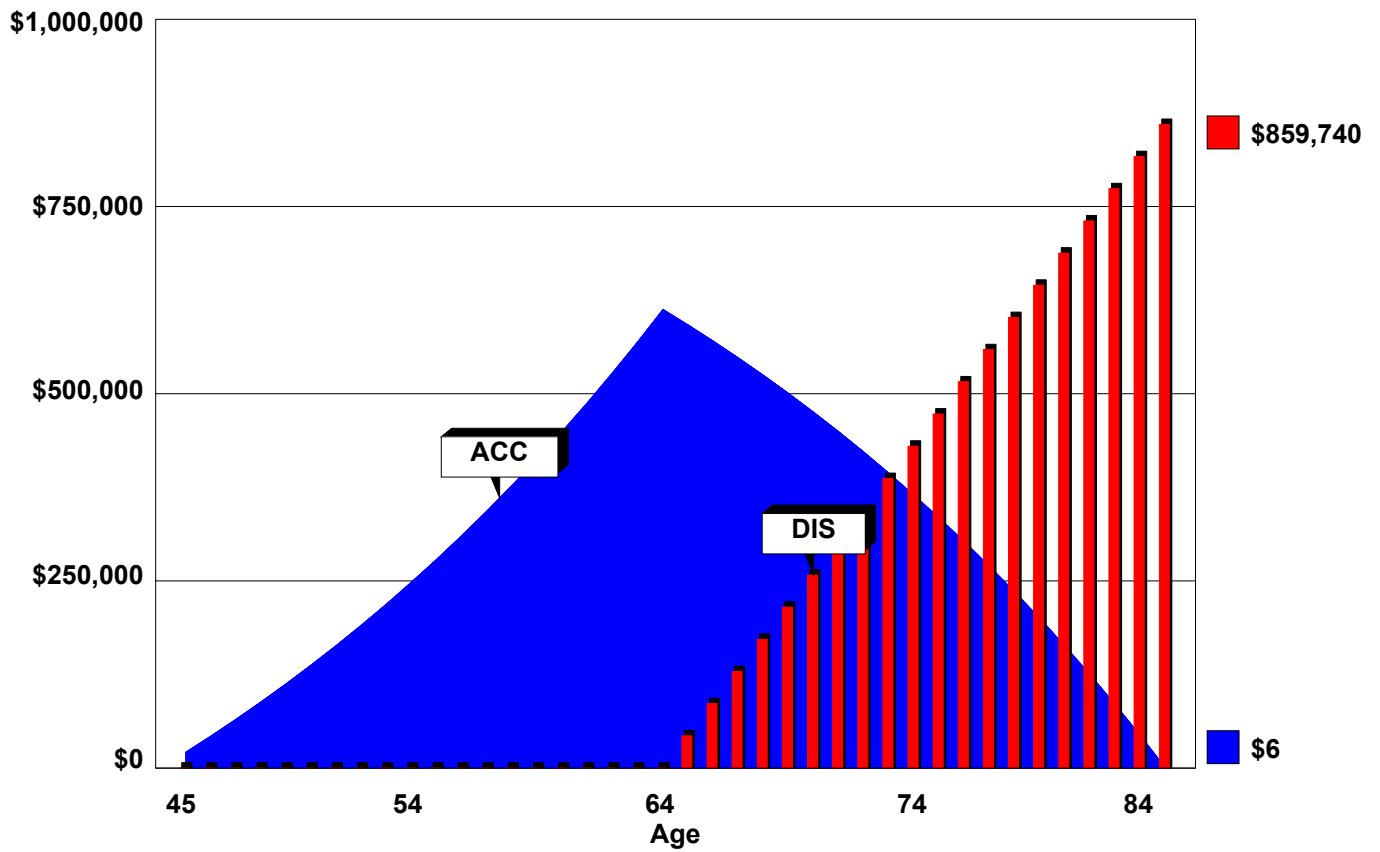
# Investment Analysis Using a Taxable Account

Date: [Current date appears here]

Presented By: [Licensed user's name appears here]

For: George Baker, MD

## Accumulation and Distribution Summary



■ ACC - Account Values  
■ DIS - Cumulative After Tax Distributions