

# Important Information Regarding these Reports

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## **Analysis Reports:**

This analysis estimates the gap between your current financial resources and your ability to meet a future need and is based on a series of assumptions. The reports and graphs are dependent upon the quality and accuracy of data furnished by you. Assumed rates of return may fluctuate, tax laws may change and past performance may not continue in the future, all of which would result in an analysis that looks substantially different from this one.

No liability is assumed resulting from the use of the information contained in this analysis. Responsibility for any financial decisions is assumed by you. This analysis is for estimating purposes only and must be reviewed periodically in the event your circumstances or financial situation changes.

## **Assumptions**

Any rates of return or information used for general calculations are provided by the client and should be assumed to be estimates only and not predictive of future results.

## **Tax and legal information:**

The information in these reports is not written or intended as tax or legal advice and may not be relied on for purposes of avoiding any federal tax penalties. Individuals are encouraged to seek personal tax or legal counsel.

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# Retirement Analysis

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## Income Goals

You have indicated that you would like to have the following monthly retirement income:<sup>1</sup>  
At Mr. 's age 66 - 80.00% of current income, or \$5,000

## Income Sources

To support these goals you have the following monthly sources:

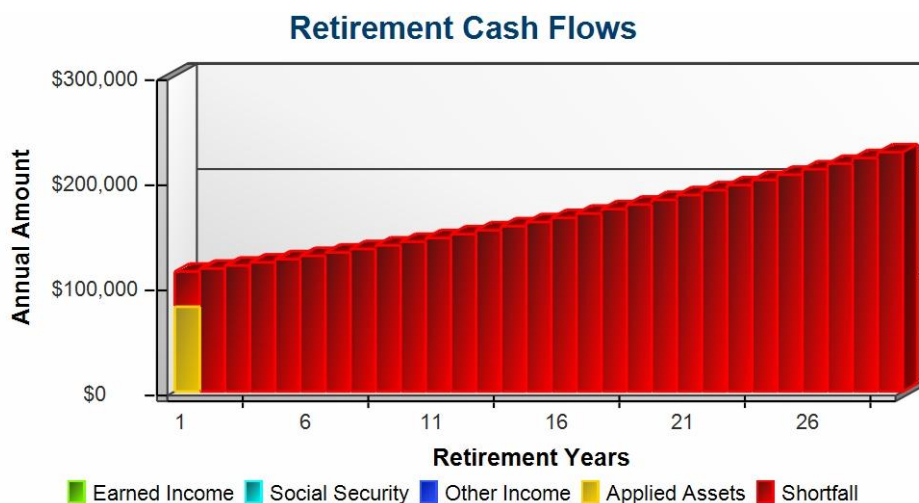
## Available Assets at Retirement

Mr. 's retirement assets - \$79,494

Other assets - \$0

## Analysis

Your funds will be depleted at Mr. 's age 66. Your current savings of \$0 will need to be increased by \$1,881 with the additional monthly savings earning a rate of return of 8.00%.



***An additional \$1,973,487 will be required at retirement to meet your goals.***

Values shown in this presentation are hypothetical and not a promise of future performance.

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<sup>1</sup> Monthly amounts shown are in today's dollars.