

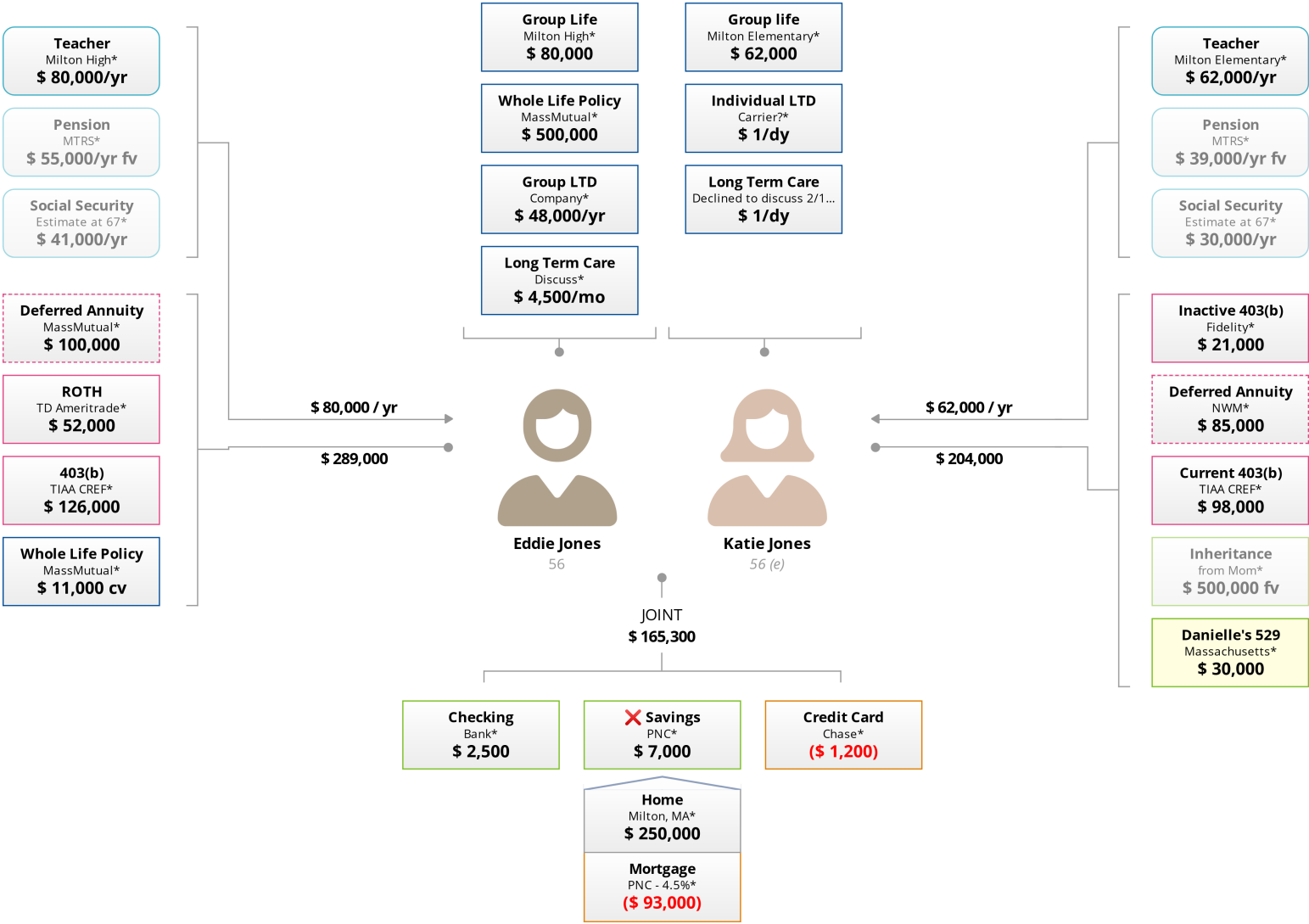
Sample: Educator - Jones

June 2025

Eddie Jones (56)
Primary

Katie Jones (56e)
Spouse

Danielle Jones (21)
Family



Target-Map® Summary

Loss of Life - Katie Jones



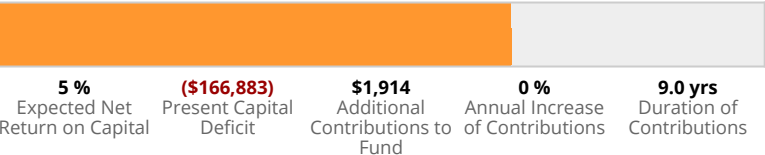
Based on the calculation performed, this Target-Map® is 11% funded to meet the capital required in the event of an untimely death. Assuming a hypothetical 5% expected net return on capital, the amount of additional capital required to fund this need today is \$ 523,920.

Loss of Life - Eddie Jones



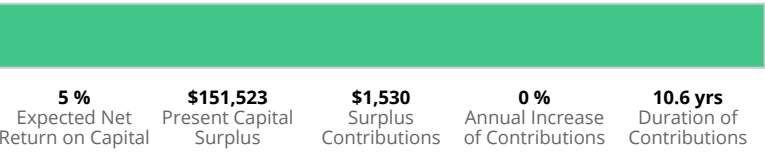
Based on the calculation performed, this Target-Map® is 83% funded to meet the capital required in the event of an untimely death. Assuming a hypothetical 5% expected net return on capital, the amount of additional capital required to fund this need today is \$ 118,776.

Long-term Disability - Eddie Jones



Based on the calculation performed, this Target-Map® is 67% funded to meet the capital required in the event of an untimely disability. Assuming a hypothetical 5% expected net return on capital, the amount of additional capital required to fund this need today is \$ 166,883 or \$ 1,914 of monthly contributions inflated by 0% annually for 9.0 years.

Retirement Funding - Eddie Jones & Katie Jones

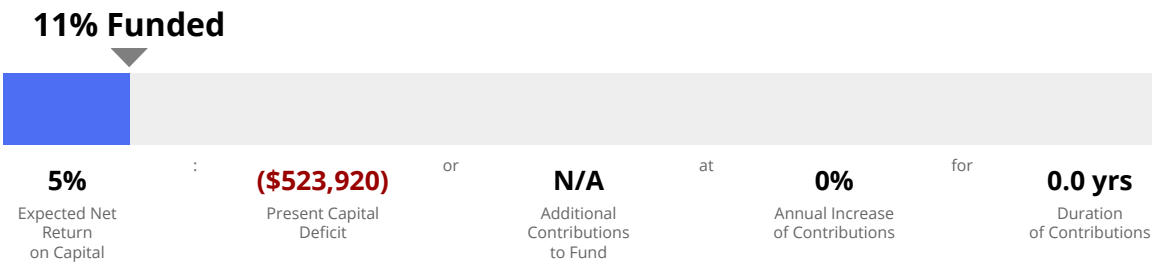


Based on the calculation performed, this Target-Map® is 111% funded to meet the capital required to fund retirement expenses. Assuming a hypothetical 5% expected net return on capital, the amount of surplus net capital assigned to fund this need today is \$ 151,523 or the equivalent of \$ 1,531 of monthly surplus contributions inflated by 0% annually for 10.6 years.

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Loss of Life - Katie Jones

Based on the calculation performed, this Target-Map® is 11% funded to meet the capital required in the event of an untimely death. Assuming a hypothetical 5% expected net return on capital, the amount of additional capital required to fund this need today is \$ 523,920.



What You Want

What You Have

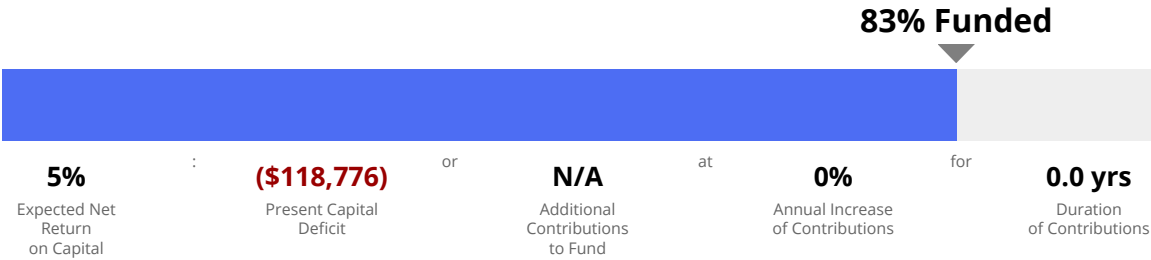
Capital Required (Present Value)	(\$585,920)	Capital Available (Present Value Equivalent)	\$62,000
After-tax Cash Flow Desired		Cash Flow Sources Available 0%	
<div><div>• Income Replacement (70% Annual Income): Starting at Katie Jones age 56 (\$43,400 inflated at 2%/year for 11 years)</div><div>\$405,887</div></div>		<div>• No Active Incomes</div>	
<div><div>• Debt Obligations: Katie Jones age 56 (\$94,200)</div><div>\$94,200</div></div>		Assets Available 0%	
<div><div>• Final Expenses: Katie Jones age 56 (\$25,000)</div><div>\$25,000</div></div>		<div>• No Active Assets</div>	
<div><div>• Education Expenses: Starting at Danielle Jones age 21 (\$40,000 inflated at 5%/year for 1 year)</div><div>\$25,333</div></div>		Insurance Available 11%	
<div><div>• Emergency Reserves (25% Ann. Household Income): Katie Jones age 56 (\$35,500)</div><div>\$35,500</div></div>		<div>• Group life : Milton Elementary * Katie Jones age 56 (\$62,000 less 0% Tax)</div> <div>\$62,000</div>	

Calculations are based on a present value comparison between the total capital needed in a hypothetical cash-flow scenario occurring within the time frame specified and the present value of capital currently available to meet the stated need. *"Capital Required" and "Capital Available" are based on a formula comprising an annual sum inflated at the stated 0% factor, unless otherwise noted with a cost of living adjustment (COLA), and an assumed return on the available capital of the stated hypothetical 5% rate net of fees and expenses. "Monthly contributions" represent ongoing capital needed during the stated duration in years that would replace the deficit in funding. A surplus indicates the available funding sources exceeds the required funding. Any monthly additions are assumed to increase each year by the stated annual increase factor. The impacts of taxes are approximated by reducing the present value of a particular capital item by an assumed embedded tax. The impact of investment style and market fluctuation cannot be predicted and are not taken into account. Both this report and the preparer make no assurances that the specified hypothetical rates of return in this material will be attained.

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Loss of Life - Eddie Jones

Based on the calculation performed, this Target-Map® is 83% funded to meet the capital required in the event of an untimely death. Assuming a hypothetical 5% expected net return on capital, the amount of additional capital required to fund this need today is \$ 118,776.



What You Want

Capital Required (Present Value) (\$698,776)

After-tax Cash Flow Desired

• Income Replacement (70% Annual Income): Starting at Eddie Jones age 56 (\$56,000 inflated at 2%/year for 11 years)	\$518,743
• Debt Obligations: Eddie Jones age 56 (\$94,200)	\$94,200
• Final Expenses: Eddie Jones age 56 (\$25,000)	\$25,000
• Education Expenses: Starting at Danielle Jones age 21 (\$40,000 inflated at 5%/year for 1 year)	\$25,333
• Emergency Reserves (25% Ann. Household Income): Eddie Jones age 56 (\$35,500)	\$35,500

What You Have

Capital Available (Present Value Equivalent) \$580,000

Cash Flow Sources Available 0%

- No Active Incomes

Assets Available 0%

- No Active Assets

Insurance Available 83%

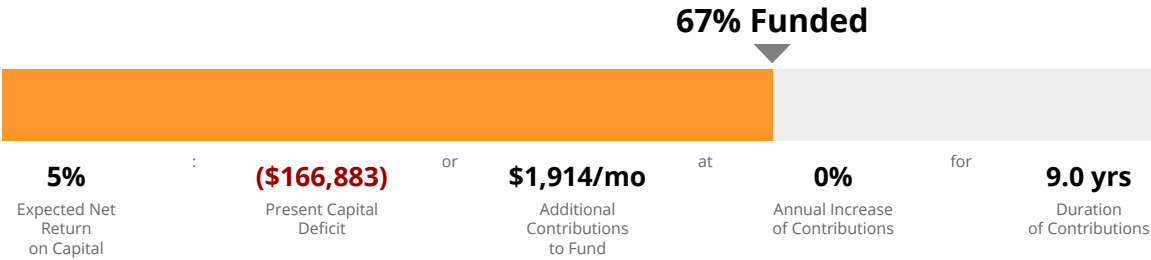
• Whole Life Policy: MassMutual * Eddie Jones age 56 (\$500,000 less 0% Tax)	\$500,000
• Group Life : Milton High * Eddie Jones age 56 (\$80,000 less 0% Tax)	\$80,000

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Long-term Disability - Eddie Jones

Based on the calculation performed, this Target-Map® is 67% funded to meet the capital required in the event of an untimely disability. Assuming a hypothetical 5% expected net return on capital, the amount of additional capital required to fund this need today is \$ 166,883 or \$ 1,914 of monthly contributions inflated by 0% annually for 9.0 years.



What You Want

Capital Required (Present Value)	(\$512,491)
After-tax Cash Flow Desired	
• Income Replacement (70% Ann. Earned Income): Starting at Eddie Jones age 56 (\$56,000 inflated at 3%/year for 9 years)	\$448,430
• Lost Retirement Savings (10%): Starting at Eddie Jones age 56 (\$8,000 inflated at 3%/year for 9 years)	\$64,061

What You Have

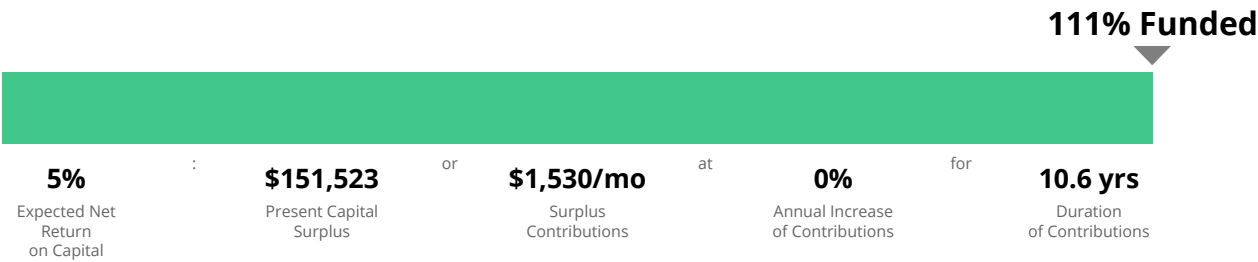
Capital Available (Present Value Equivalent)	\$345,608
Cash Flow Sources Available 0%	
• No Active Incomes	
Assets Available 0%	
• No Active Assets	
Insurance Available 67%	
• Group LTD: Company * Starting at Eddie Jones age 56 (\$48,000/yr until age 65 COLA 0% less 0% Tax)	\$345,608

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Retirement Funding - Eddie Jones & Katie Jones

Based on the calculation performed, this Target-Map® is 111% funded to meet the capital required to fund retirement expenses. Assuming a hypothetical 5% expected net return on capital, the amount of surplus net capital assigned to fund this need today is \$ 151,523 or the equivalent of \$ 1,531 of monthly surplus contributions inflated by 0% annually for 10.6 years.



What You Want

Capital Required (Present Value) (\$1,363,065)

After-tax Cash Flow Desired

• Living Expenses (50% Primary/Spouse Ann. Income): Starting at Eddie Jones age 67 (\$71,000 inflated at 3%/year for 23 years)	\$1,086,583
• Travel Expenses (10% Primary/Spouse Ann. Income): Starting at Eddie Jones age 67 (\$14,200 inflated at 3%/year for 13 years)	\$134,482
• Medical Expenses (10% Primary/Spouse Ann. Income): Starting at Eddie Jones age 80 (\$14,200 inflated at 5%/year for 10 years)	\$142,000

What You Have

Capital Available (Present Value Equivalent) \$1,514,588

Cash Flow Sources Available 84%

• Pension : MTRS * Starting at Eddie Jones age 67 (FV \$55,000 for 23 years COLA 0% less 25% Tax)	\$348,221
• Pension : MTRS * Starting at Katie Jones age 67 (FV \$39,000 for 23 years COLA 0% less 25% Tax)	\$245,486
• Social Security : Estimate at 67 * Starting at Eddie Jones age 67 (\$41,000 for 23 years COLA 0% less 15% Tax)	\$294,194
• Social Security : Estimate at 67 * Starting at Katie Jones age 67 (\$30,000 for 23 years COLA 0% less 15% Tax)	\$214,013
• 403(b) Contributions : TIAA CREF * Starting at Eddie Jones age 56 (\$6,000 for 11 years COLA 0% less 25% Tax)	\$38,174

Assets Available 27%

• Inactive 403(b): Fidelity * (\$21,000 less 25% Tax)	\$15,750
• Deferred Annuity: MassMutual * (\$100,000 less 25% Tax)	\$75,000
• Deferred Annuity: NWM * (\$85,000 less 25% Tax)	\$63,750
• ROTH : TD Ameritrade * (\$52,000 less 0% Tax)	\$52,000
• 403(b): TIAA CREF * (\$126,000 less 25% Tax)	\$94,500
• Current 403(b): TIAA CREF * (\$98,000 less 25% Tax)	\$73,500

Insurance Available 0%

- No Active Insurance Policies

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