

Econ Wealth Management

Using What If Scenario 1

Snapshot as of May 28, 2024

Probability of Success



Action Items

- None entered

Net Worth

\$1,705,475

Investment Assets: \$1,405,475

Liabilities: \$0

Current Income



■ Social Security: 35.84%
■ Other: 64.15%

Upcoming Goals

2024

Health Care	\$11,791
Rekurs annually	
Living Expense	\$78,000
Rekurs annually	
LTC - Updated 11-4-21	\$4,141
Rekurs every 1 years	
New Car	\$50,000
One-time expense	
Travel	\$14,280
Rekurs every 1 years	
VUL	\$11,349
Rekurs every 1 years	

2025

Health Care	\$11,791
Rekurs annually	

Additional information and important disclosures can be found on the next page

Current Cash Flow

Total Expenses: -\$184,054

Income: \$114,014

Withdrawals: \$70,040

Insurance Policy Inventory

Policy Type	Peter	Marie
Life	1	1
LTC	0	0
Disability	0	0
Joint		
Property & Casualty	0	

Additional Action Items

- None entered

Goal Summary

Need	Start/End	Amount Per
Health Care	2024-2042	\$11,791
Health Care	2043-2046	\$6,825
Living Expense	2024-2042	\$78,000
Living Expense	2043-2046	\$72,000
Want	Start/End	Amount Per
LTC - Updated 11-4-21	2024-2046	\$4,141
New Car	2024-2024	\$50,000
Travel	2022-2036	\$14,280
VUL	2017-2046	\$11,349

Assets by Asset Class

Asset Class	% Total	Amount Per
Cash & Cash Alternatives	9.79%	\$137,654
Large Cap Value Stocks	16.52%	\$232,203
Large Cap Growth Stocks	9.42%	\$132,378
Mid Cap Stocks	14.90%	\$209,428
Small Cap Stocks	7.44%	\$104,510
International Developed Stocks	5.82%	\$81,866
Short Term Bonds	1.96%	\$27,541
Intermediate Term Bonds	13.22%	\$185,820
Long Term Bonds	2.56%	\$36,015
High Yield	0.00%	\$0
Non-US Bonds	0.00%	\$0
Multi Sector	1.24%	\$17,392
Alternative Fixed Income	0.00%	\$0
International Emerging Stocks	3.73%	\$52,384
U.S. Bonds	2.07%	\$29,051
Commodity	0.00%	\$0
REIT	0.00%	\$0
Other Bonds	0.00%	\$0
Tax Free	0.00%	\$0
Allocation	1.26%	\$17,753

IMPORTANT DISCLOSURE INFORMATION

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