

Prepared For:
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PROFORMA

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Client Asset

Spouse Asset

Proposed Asset

Unused Asset

Franklin Funds
Joint
\$84,157

John's IRA
Smith, John
\$125,000

Wells Fargo
Savings
Joint
\$40,000

John's 401k
\$452,124
401K

Jane's 401k
\$329,945
401K

At Retirement

\$452,124
Income Annuity

- Protection against downturns
- Guaranteed Income Stream for life with Potential increases
- Growth Potential
- Death Benefit

\$329,945
Income Annuity at 66

- Protection against downturns
- Guaranteed Income Stream for life with Potential increases
- Growth Potential
- Death Benefit

This example is shown for illustrative purposes only, is not guaranteed, and should not be used to predict or project future results. Actual results will vary (including conditions that would affect the outcome, such as fees/charge, market conditions, etc.). This represents past performance only, and may not be used to predict or project future results.