



## RETIREMENT GUESSTIMATOR AND DISTANCE TO GOAL TRIANGULATION©

Every exit plan starts by plotting three points of critical information: where you are now, where you need to go and how much time you're willing to take to get there. Use the "Quick Retirement Guesstimator" to estimate your retirement needs, then use the value in your chosen timeframe for the Triangulation exercise below.

Fill in values in **WHITE** fields ONLY, then complete the Triangulation table using Guesstimator values.

### Quick Retirement Guesstimator

* Anticipated Monthly Expenses after Exit	\$20,000
* Expected Monthly Social Security	\$3,000
* Plus Estimated Income Taxes	\$4,335
* Required Monthly Income	\$21,335
* Principal Needed to Fund Retirement	\$6,400,500

15 Years	20 Years	25 Years	30 Years	Indefinitely
\$2,846,530	\$3,479,395	\$3,999,565	\$4,427,106	\$6,400,500

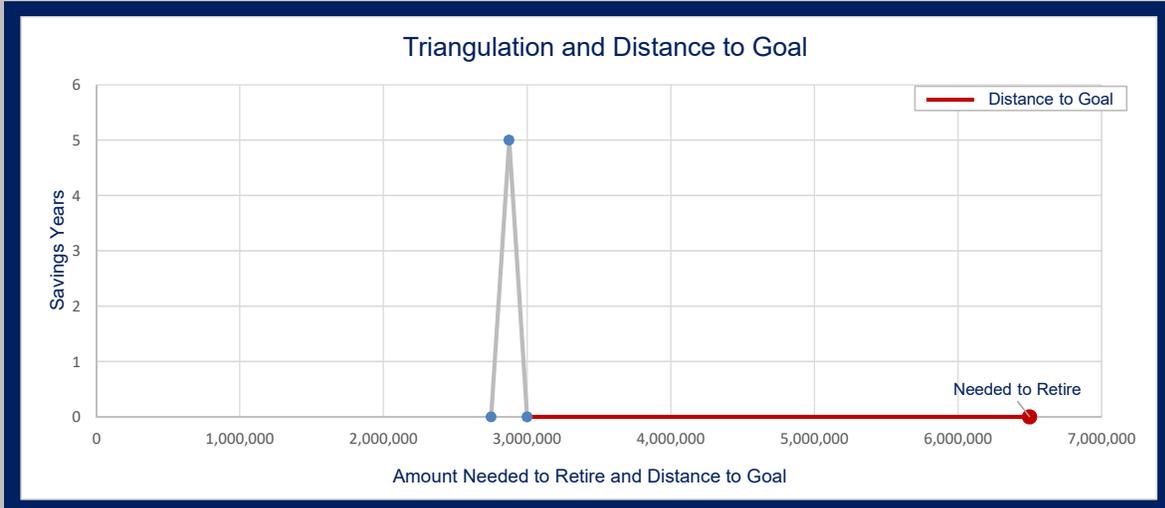
**DISCLAIMER:** Our Retirement Guesstimator assumes a 4% annual return on liquid assets for the specified timeframe. It does not consider longevity, inflation or market variables, and is not intended to replace a professionally prepared financial plan.

### Triangulation and Distance to Goal

The triangle below shows your current net worth as the left baseline point, and your future need for retirement as the point on the baseline in **RED**. Fill the "Amount of Cash Required at Retirement" field with the value that best aligns with your goals from the table above.

Fill in values in **WHITE** fields ONLY. The triangle is generated automatically.

	Dollars	Years
* Amount of Cash Required at Retirement	\$6,500,000	
* Number of Years to Planned Exit		5
* Annual Savings from Cash Flow	\$50,000	
* Current Liquid Savings	\$2,750,000	Submit



Distance to Goal

\$3,500,000.00

The triangle above shows your current net worth as the left baseline point (Liquid Savings) and your future net worth, based on the amount generated from your business over your timeframe, as the right baseline point (\$Accrued). The line from \$Accrued to Needed to Retire (in red) is your "Distance to Goal;" the amount needed over current cash flow to reach your objective. It may be generated by increasing profits, selling your business, or lengthening your timeframe. If the "Needed to Retire" point is inside the triangle, you should reach your goal in your timeframe.

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