



Retirement Income By Source

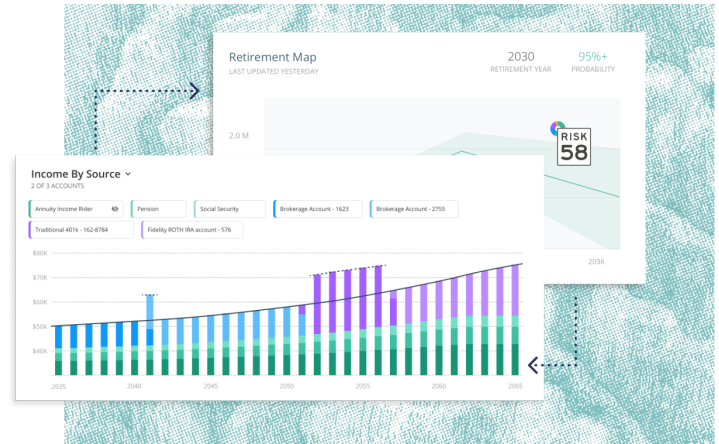
Illustrate a clear financial roadmap for your clients' decumulation phase of retirement, and provide a transparent and reassuring view of their income sources.

Income planning with just one click

With just a single tap, you can switch from Retirement Maps to Income By Source giving your clients a dynamic view into each account and product that is going to supply their income needs in retirement. You can even add Timeline events to visualize real-time impacts on their retirement income.

Want to show the effects of purchasing an annuity? You can do that.

Can you afford to pay for your grand child's college? Simply add the event.



The form is titled 'Social Security' and includes the following fields and options:

- CHOOSE EVENT TYPE:** Deposit (selected), Withdrawal, Portfolio Risk Adjustment
- AMOUNT:** \$ 1,500
- FREQUENCY:** Monthly
- START DATE:** January, 2033
- DURATION (YEARS):** Does not end
- Buttons:** CANCEL, SAVE

Prove that clients have enough to retire fearlessly

Have a client with a low Risk Number that is concerned about outliving their accounts? Retirement Income by Source gives you the tools to illustrate how much income they can generate with just their social security and pension income.

With just a few clicks, you can add additional income streams like annuities or insurance products to boost their likelihood of generating enough income in retirement.

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