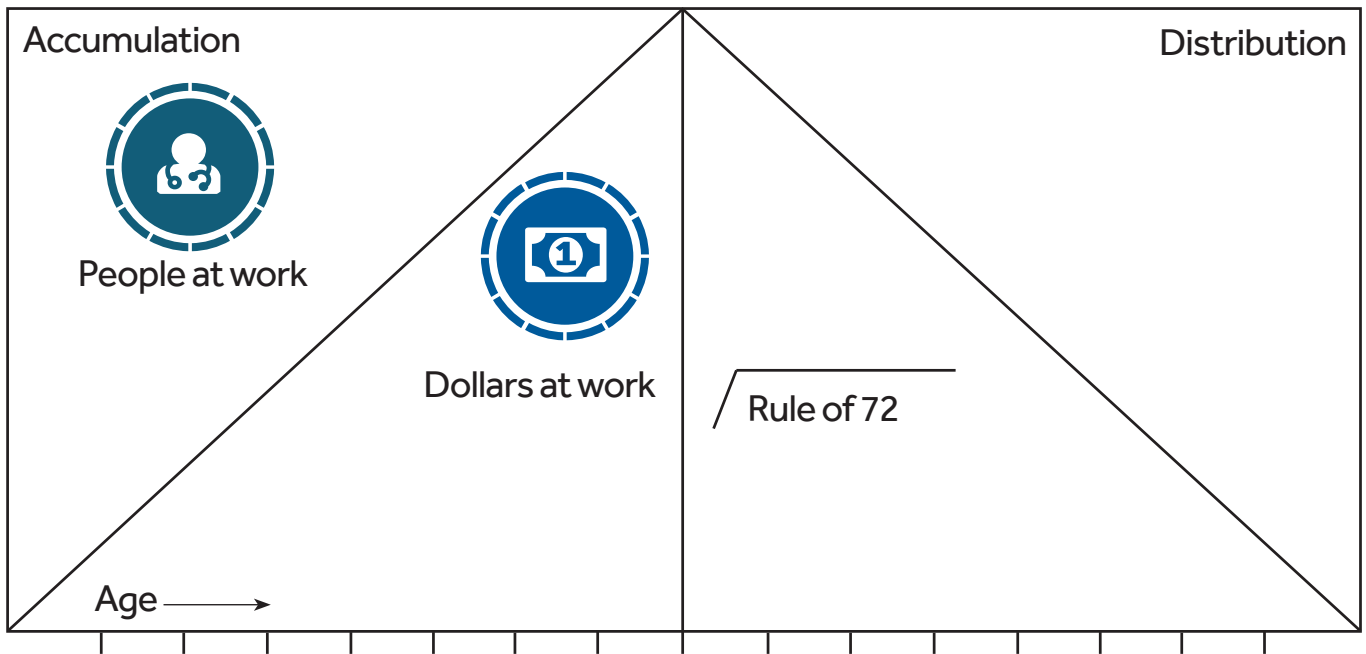


Financial EKG worksheet.

Current income	_____	_____	Desired income
Desired retirement age	_____	_____	Pension benefit #1
Years to accumulate goal	_____	_____	Pension benefit #2
Desired retirement income	_____	_____	Projected Social Security
Hypothetical return	_____ / _____	_____	
	*Pre-retirement	*In retirement	



\$ _____ @ _____
 Additional accumulation needed Amount needed to save Shortfall

 Current contribution Inflation adjusted additional accumulation needed Inflation adjusted amount needed to save Inflation adjusted shortfall

*Not indicative of any particular product. Actual returns will vary and cause projected values to be more or less than those shown. SMRU 5023248 (Exp. 06.30.2027)