



# A&I Wealth Management

A&I Wealth Management | 9605 Kingston Court, Suite 190 | Lone Tree, CO 80112  
303.690.5070 phone | 303.699.8945 fax  
www.AssetsandIncome.com

## Fifty-year-old

<https://www.assetsandincome.com/automatic-contributions-to-investment-accounts>

Desired monthly retirement \$	\$	4,167
less Social Security	\$	3,000
less pensions	\$	-
	\$	1,167
Years to retirement		17.00
Inflate at 3%	\$	1,928
<b>Lump Sum Needed \$\$\$</b>	<b>\$</b>	<b>514,219</b>
\$\$\$ currently saved	\$	100,000
Total	\$	100,000
# months to retire		204
\$\$/mo you can save	\$	500
Required annual rate return		7.2%
future value	\$	514,219
estimated return per year		10%
contributions	\$	6,000
current value	\$	100,000
years to get there		13.41
with contributions		13.4 years
without contributions		17.18 years

“The projections regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. The return assumptions are not reflective of any specific investment, product or strategy and do not include any fees or expenses that may be incurred by investing in specific securities or strategies. The actual returns of a specific security or strategy may be more or less than the returns used in example. It is not possible to directly invest in an index. Financial forecasts, rates of return, risk, inflation, and other assumptions may be used as the basis for illustrations. They should not be considered a guarantee of future performance or a guarantee of achieving overall financial objectives. Past performance is not a guarantee or a predictor of future results of either the indices or any particular investment.”



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# Two-year-old

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starting value	\$	(10)
payment	\$	(10)
weeks	\$	52
years	\$	30
periods	\$	1,560
10% per year	\$	0
Future value	\$	99,145

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