

NOW

LATER

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Total Value of the Assets

Cash = _____

Stocks and Retirement Accounts = _____

Real Estate (Excluding Primary Residence) = _____

Other Assets = _____

Total Income Without Selling Assets

Social Security = _____

Rental Income = _____

Ongoing Business Income = _____

Dividends = _____

Income = _____

Total Income it can Generate

Cash (Total divided by 30 years) = _____

Social Security = _____

Retirement Accounts (4% Rule) = _____

Business Profits = _____

Rental Income = _____

Other Income = _____

Other Assets (Total divided by 30 years) = _____