Name: _____ **Date:** _____

_____ % Willing to Risk

Income Gap Obstacles		
Risk to Principal	Loss of Spouse SS	Loss of Pension
Inflation	Paying Taxes	Increases in Budget
Medical/Rx Costs	Medical Insurance	Home Care/LTC

Income and Tax Summary		
Social Security	IRA Distributions	Pension
Social Security	IRA Distributions	Pension
Income Needs	Excess Forced Withdrawals	Provisional Income

Impact of Death or LTC Claims		
Husband	Health	% Savings at Risk
Wife	Health	% Savings at Risk
Income Left for Wife	Income Left for Husband	Savings Spent on Care

Economy Inflation Unknown Future Tax Rates Gov't. Reduction in Social Security