

THE CONFIDENT *Goal* ANALYSIS™

Investment returns are never consistent year after year. This unique process identifies the probability of reaching your important financial goals under different market conditions by running hundreds of simulations under different assumptions, and then providing recommendations to increase the likelihood of achieving your goals.

Resources	Goals	Portfolio Returns	Longevity
Investments Rents Pension Income Social Security Inheritance	Monthly Income Large Purchases Travel Plans Planned Gifts Survivor Needs	Required Returns Volatility Historic Risk	Family History Personal Health Life Expectancy

Design, Calculations, & Analysis

Design of test cases considering above factors

Hundreds of simulations for each scenario

Analysis of results

The Confident *Goal* Analysis™

The probability of reaching your goals

How long will your capital last under different scenarios?

Factors affecting your results

Strategies to increase your success

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