

Name

_____ % Willing to Risk

Income Gap Obstacles			Income and Tax Summary			Impact of Death or LTC Claims		
Risk to Principal	Loss of Spouse SS	Loss of Pension	Social Security	IRA Distributions	Pension	Husband	Health	% Savings at Risk
Inflation	Paying Taxes	Increases in Budget	Social Security	IRA Distributions	Pension	Wife	Health	% Savings at Risk
Medical/Rx Costs	Medical Insurance	Home Care/LTC	Income Needs	Excess Forced Withdrawals	Provisional Income	Income Left for Wife	Income Left for Husband	Savings Spent on Care

Economy

Inflation

Unknown Future Tax Rates

Gov't. Reduction in Social Security