Monte Carlo Inputs
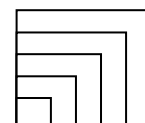
The following input data will be useful in working with Lee to do long-term financial projection probabilities.

Income and Expensess		Data	Comments
1	Date of birth, person 1	__/__/____	
2	Social Security		
2a	Age for person 1		
2b	Anticipated annual income first year	$	
2c	Age for person 2		
2d	Anticipated added annual income first year	$	
3	Pension and/or annuity		
3a	Age		
3b	Anticipated annual income	$	
4	Income		
	Next year	$	
	Expected changes in annual income other than Cost of Living		
5	Income tax rate (St & Fed. Not marginal rate.)	%	
7	House and Mortgage		
7a	House value	$	
7b	Expected + or - % from historical inflation	%	
7c	Mortgage interest rate	%	
7d	Annual principal and interest payment	$	
7e	Current mortgage amount	$	
8	Long term care		
8a	Age needed, person 1		
8b	Initial annual cost	$	
8c	Possible duration		
8d	Age needed, person 2		
8e	Possible duration		
9	Other living expenses, next year	$	
Investments			
10	Current invested assets excluding homestead	$	
11	Expected + or - % from historical equity returns	%	
12	Allocation	100%	
12a	Equities	%	
12b	Cash or T Bills	%	
12c	Bonds	%	

If your data don't fit comfortably into the above framework, we will explore how we can best adapt the tool for your situation.

An alternative to mutual funds.

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