

RETIREMENT PROJECTION

Prepared for: Alex Johnson

Date: October 2023

CURRENT BALANCE **\$125,000**

MONTHLY CONTRIBUTION **\$2,500**

EXPECTED RETURN **7.0%**

TARGET GOAL **\$2,000,000**

YEAR	AGE	ANNUAL CONTRIBUTION	INTEREST EARNED	END BALANCE
2024	35	\$30,000	\$9,800	\$164,800
2025	36	\$30,000	\$12,586	\$207,386
2026	37	\$30,000	\$15,567	\$252,953
2027	38	\$30,000	\$18,756	\$301,709
2028	39	\$30,000	\$22,169	\$353,878
2033	44	\$30,000	\$43,510	\$695,210
2038	49	\$30,000	\$75,442	\$1,180,345
2043	54	\$30,000	\$122,550	\$1,894,850

*This is a projection based on fixed parameters. Actual market results may vary.