



Below is a view of the Workbook Main Window for Blog #150 from Wealthy and Wise® along with a more complete description of each illustration.

Wealthy and Wise (v 12.0) - Blog #150 (1. Compare Two Strategies) - [Wealthy and Wise (v 12.0)]

Client Workbook Edit Tools Options Help

For the columns below, display values for client age: 94

This Workbook contains stored reports for: Blog #150

Edit Client Data

Scenarios

Scenario Storage Name	Scenario Title	Net Worth	Taxable Estate	Wealth To Charity	Wealth To Heirs	Liquid Assets
1. Status Quo - Keep the IRA	Status Quo - Keep the IRA	\$6,540,690	\$6,540,690	\$0	\$6,540,690	\$3,716,249
2. Convert IRA to Roth IRA	Convert IRA to Roth IRA	\$8,456,413	\$8,456,413	\$0	\$8,456,413	\$5,631,972
3. Convert IRA to Roth/Add IUL	Convert IRA to Roth IRA & Add I	\$10,305,956	\$10,349,646	\$0	\$10,349,646	\$7,189,769

New... Copy Edit Delete Preview Print

Comparisons

Comparison Storage Name	Comparison Title	Scenario #1 Description	Scenario #2 Description	Scenario #3 Description
1. Compare Two Strategies	IRA vs. Roth IRA	1. Status Quo - Keep the IRA	2. Convert IRA to Roth IRA	
2. Compare Three Strategies	IRA vs. Roth IRA vs. Roth IRA +	1. Status Quo - Keep the IRA	2. Convert IRA to Roth IRA	3. Convert IRA to Roth/Add IUL

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Storage names can be edited on this screen by single-clicking the selected storage name.

Preview or Print Client Presentation...

Scenario 1: Check required cash flow impact on overall assets to determine cash flow, residual net worth and wealth to heirs.

Scenario 2: Evaluate the cost and benefits of a Roth Conversion and its impact on cash flow, residual net worth and wealth to heirs.

Scenario 3: Evaluate the cost and benefits of adding Indexed Universal Life to Scenario 2 and its impact on cash flow, residual net worth and wealth to heirs.

Comparison 1: Compare Scenarios 1 and 2 as to the impact on cash flow, residual net worth and wealth to heirs.

Comparison 2: Compare Scenarios 1, 2, and 3 as to the impact on cash flow, residual net worth and wealth to heirs.