

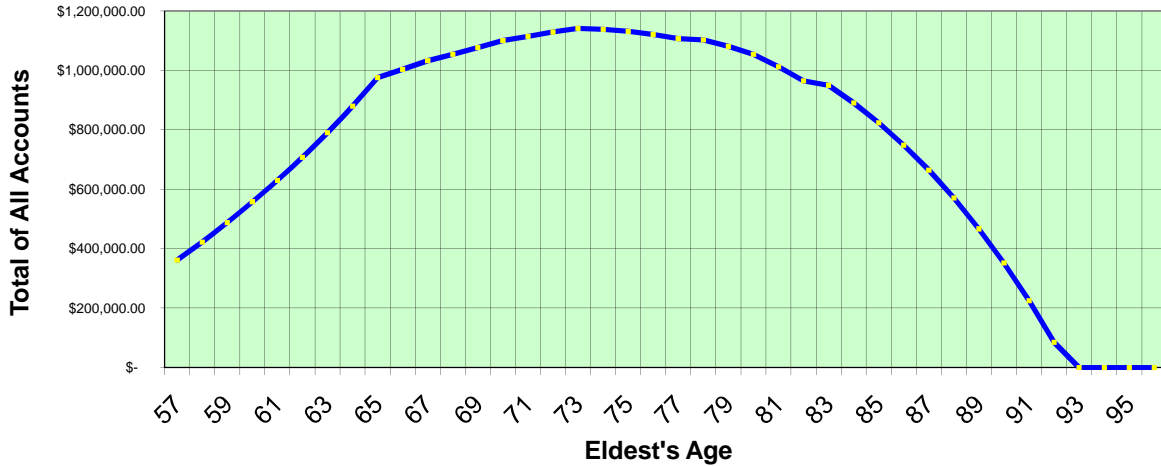
Projected Retirement SnapshotSM

Snapshot # 1

26-Jun-2009

John Q. Public and Mary Q. Public

40-YEAR PROJECTION



DISCLAIMER: There are no guarantees either implied or expressed by these projections. Many assumptions have been used, all of which will be different than shown. Your actual results will be either better or worse. Investing always involves risk. Investors can and do lose money. Obtain, read and understand the prospectus for any investment you are considering prior to investing or sending money. Consult your CPA for income tax advice. Consult your attorney for legal advice. Colson Financial Group, Inc. does not provide either.
© 1987-2009 by Colson Financial Group, Inc., 303.986.9977

Today's Date		Eldest's Expected Retirement Age		Projected Retirement Snapshot SM		Youngest's Expected Retirement Age		Snapshot #	
26-Jun-2009		65		John Q. Public and Mary Q. Public		62		1	
3.5%	Inflation Rate	\$ 36,000.00	PV Ann. After-Tax W/D at Age	65	Txbl Cash Accts Total	\$ 25,000.00	Txbl Cash Equiv Total	\$ 10,000.00	
35.0%	Pre-Rtrmnt Tx Rate	\$ -	PV Ann. After-Tax W/D at Age	200	Annual Add'l Invstmnt	\$ -	Annual Add'l Invstmnt	\$ -	
20.0%	Post-Rtrmnt Tx Rate	\$ -	PV Ann. After-Tax W/D at Age	200	Inflation Adjust	YES	Inflation Adjust	YES	
15.0%	LT Cap Gains Tx Rl	\$ -	PV Ann. After-Tax W/D at Age	200	Annual Rate of Return	1.00%	Annual Rate of Return	3.00%	
Invstmnt Real Est Gross Value		\$ 200,000.00	Eldest's Expected Inheritance in Future Dollars		\$ 10,000.00	Rate of Return at Eldest's Age			
Total Amount Owed for All Mtgs		\$ 150,000.00	Number of Years Before Receipt of Eldest's Expected Inheritance		20	1st	9.00%	0	
Cost Basis		\$ 175,000.00	Youngest's Expected Inheritance in Future Dollars		\$ 30,000.00	2nd	8.00%	50	
Annual Real Estate Appreciation		4.00%	Number of Years Before Receipt of Youngest's Expected Inheritance		25	3rd	7.00%	60	
Years Remaining on Mortgage		15	Taxable Brokerage Account Total		\$ 75,000.00	4th	6.00%	70	
Years Until Sale of Real Estate		10	Inflation Adjust		YES	5th	5.00%	80	
Eldest's NQ Def Ann & LI CV		\$ 5,000.00	Eldest's Qualified Tax-Deferred Accounts		\$ 125,000.00	Rate of Return at Eldest's Age			
Annual Add'l Investment		\$ -	Annual Additional Investment Including Employer Match		\$ 12,000.00	1st	10.00%	0	
Inflation Adjust		YES	Inflation Adjust		YES	2nd	9.00%	50	
Cost Basis		\$ -				3rd	8.00%	60	
Annual Rate of Return		4.00%				4th	7.00%	70	
Youngest's NQ Def Ann & LI CV		\$ 3,000.00	Youngest's Qualified Tax-Deferred Accounts		\$ 80,000.00	Rate of Return at Youngest's Age			
Annual Add'l Investment		\$ -	Annual Additional Investment Including Employer Match		\$ 6,000.00	1st	10.00%	0	
Inflation Adjust		YES	Inflation Adjust		YES	2nd	9.00%	50	
Cost Basis		\$ -				3rd	8.00%	60	
Annual Rate of Return		4.00%				4th	7.00%	70	
Eldest's Roth IRA		\$ 2,000.00	Youngest's Roth IRA		\$ 2,000.00				
Annual Add'l Investment		\$ -	Annual Add'l Investment		\$ -				
Inflation Adjust		YES	Inflation Adjust		YES				
Number of Years Roth in Force		0	Number of Years Roth in Force		0				
Rate of Return at Age		11.00%	0	Rate of Return at Age		11.00%	0		
Rate of Return at Age		10.00%	50	Rate of Return at Age		10.00%	50		
Rate of Return at Age		9.00%	60	Rate of Return at Age		9.00%	60		
Rate of Return at Age		8.00%	70	Rate of Return at Age		8.00%	70		
Rate of Return at Age		7.00%	80	Rate of Return at Age		7.00%	80		

DISCLAIMER: There are no guarantees either implied or expressed by these projections. Many assumptions have been used, all of which will be different than shown. Your actual results will be either better or worse. Investing always involves risk. Investors can and do lose money. Obtain, read and understand the prospectus for any investment you are considering prior to investing or sending money. Consult your CPA for income tax advice. Consult your attorney for legal advice. Colson Financial Group, Inc. does not provide either.
© 1987-2009 by Colson Financial Group, Inc., 303.986.9977