

Your **Company** Logo

Early Retirement Illustration

for

Example Client

Created by Your Name

Your Company

Introduction

The following report contains an Early Retirement forecast. This takes the forecasted values of both your immediate and deferred incomes in order to illustrate how each option will affect your finances over the next 40 years. This report will help illustrate the differences between taking the money now and deferring it, in order to decide which is the best in your individual circumstances.

All figures displayed are in today's terms.

Overview

Forecasts included:

- NHS retire 3 years early - BEFORE tax

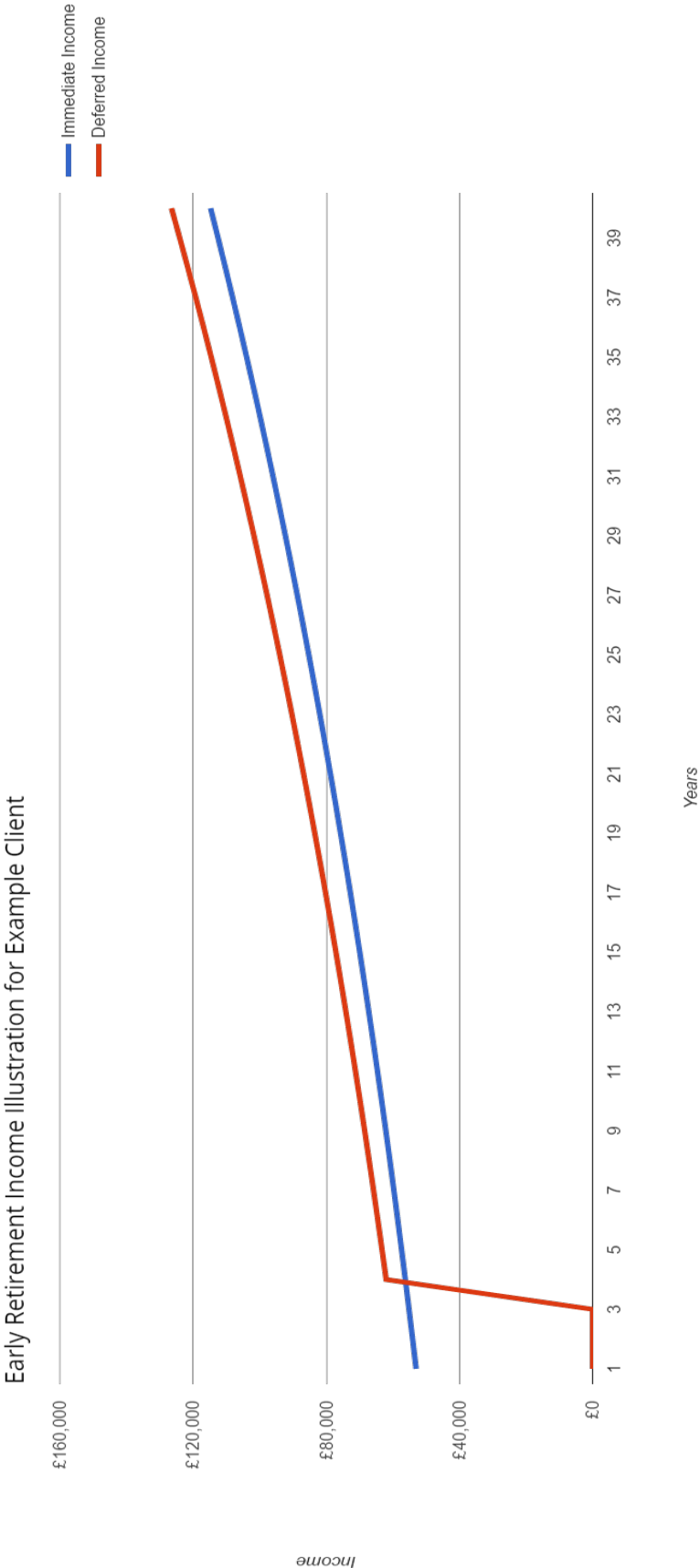
Forecast: NHS retire 3 years early - BEFORE tax

Assumed Inflation Rate:
2%

Years Deferred:
3

Deferred Income:
£62,000

Immediate Income:
£53,000



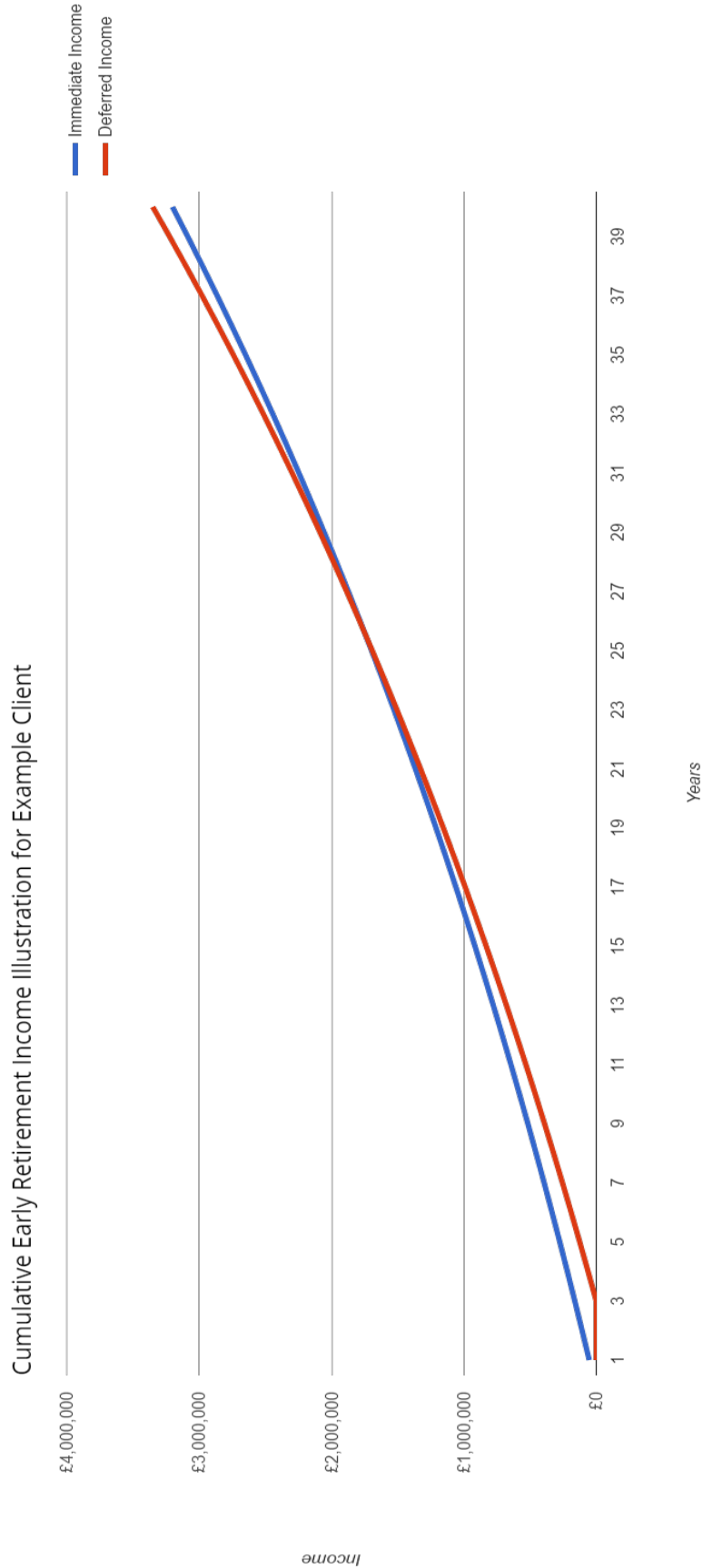
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Early Retirement Report for Example Client

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Immediate Income:
£53000

Deferred Income:
£62000

Years Deferred:
3

Assumed Inflation Rate:
2%

Year by year breakdown (NHS retire 3 years early - BEFORE tax)

Year	Age	Immediate Income	Deferred Income	Cumulative Immediate Income	Cumulative Deferred Income
1	55	£53,000.00	£0.00	£53,000.00	£0.00
2	56	£54,060.00	£0.00	£107,060.00	£0.00
3	57	£55,141.20	£0.00	£162,201.20	£0.00
4	58	£56,244.02	£62,000.00	£218,445.22	£62,000.00
5	59	£57,368.90	£63,240.00	£275,814.13	£125,240.00
6	60	£58,516.28	£64,504.80	£334,330.41	£189,744.80
7	61	£59,686.61	£65,794.90	£394,017.02	£255,539.70
8	62	£60,880.34	£67,110.79	£454,897.36	£322,650.49
9	63	£62,097.95	£68,453.01	£516,995.31	£391,103.50
10	64	£63,339.91	£69,822.07	£580,335.21	£460,925.57
11	65	£64,606.70	£71,218.51	£644,941.92	£532,144.08
12	66	£65,898.84	£72,642.88	£710,840.76	£604,786.96
13	67	£67,216.82	£74,095.74	£778,057.57	£678,882.70
14	68	£68,561.15	£75,577.65	£846,618.72	£754,460.36
15	69	£69,932.37	£77,089.21	£916,551.10	£831,549.56
16	70	£71,331.02	£78,630.99	£987,882.12	£910,180.55
17	71	£72,757.64	£80,203.61	£1,060,639.76	£990,384.17
18	72	£74,212.80	£81,807.68	£1,134,852.56	£1,072,191.85
19	73	£75,697.05	£83,443.84	£1,210,549.61	£1,155,635.69
20	74	£77,210.99	£85,112.71	£1,287,760.60	£1,240,748.40
21	75	£78,755.21	£86,814.97	£1,366,515.81	£1,327,563.37
22	76	£80,330.32	£88,551.27	£1,446,846.13	£1,416,114.63
23	77	£81,936.92	£90,322.29	£1,528,783.05	£1,506,436.93
24	78	£83,575.66	£92,128.74	£1,612,358.71	£1,598,565.67
25	79	£85,247.17	£93,971.31	£1,697,605.89	£1,692,536.98
26	80	£86,952.12	£95,850.74	£1,784,558.00	£1,788,387.72
27	81	£88,691.16	£97,767.75	£1,873,249.16	£1,886,155.47
28	82	£90,464.98	£99,723.11	£1,963,714.15	£1,985,878.58
29	83	£92,274.28	£101,717.57	£2,055,988.43	£2,087,596.15
30	84	£94,119.77	£103,751.92	£2,150,108.20	£2,191,348.08
31	85	£96,002.16	£105,826.96	£2,246,110.36	£2,297,175.04
32	86	£97,922.21	£107,943.50	£2,344,032.57	£2,405,118.54
33	87	£99,880.65	£110,102.37	£2,443,913.22	£2,515,220.91
34	88	£101,878.26	£112,304.42	£2,545,791.48	£2,627,525.33
35	89	£103,915.83	£114,550.51	£2,649,707.31	£2,742,075.84
36	90	£105,994.15	£116,841.52	£2,755,701.46	£2,858,917.35
37	91	£108,114.03	£119,178.35	£2,863,815.49	£2,978,095.70
38	92	£110,276.31	£121,561.91	£2,974,091.80	£3,099,657.61
39	93	£112,481.84	£123,993.15	£3,086,573.64	£3,223,650.77
40	94	£114,731.47	£126,473.02	£3,201,305.11	£3,350,123.78