

Mr & Mrs. Sample

Insight 360° Retirement Readiness Score



Goal Summary

- Mr. and Mrs. Sample to retire in 2030
- Spending during retirement: **\$102,000** per year (\$8,500 per month)

Assumption Summary

- Life expectancy for Mr. Sample: 100 / Mrs. Sample: 98
- Average inflation rate: 2.10%
- Average rate of return: 5.42%

Goal Status



On Track

You are **146% ahead** of your retirement target of 2030 (age 65 & 63).

You have the capacity to retire up to **4 years earlier (2026)** based on current household assets and expenses.

Net Worth Statement Summary

Financial Assets	\$1,314,492
Non-Registered	\$256,740
TFSA	\$314,669
Registered	\$743,084
Real Assets	\$798,249
Debts	(\$117,006)
Net Worth	\$1,995,736