

## Como Actualizar la Calculadora de Ingresos para la Jubilación

Hace clic el video para mirar:



Si no puede mirar la imagen, copia y pega este URL en su navegador.

<https://www.brainshark.com/johnsonfinancialgroup/vu?pi=zFVzWpE09zRRuz0&intk=583061897>

### Instrucciones de paso a paso

Inicia sesión a su cuenta en <https://participant.johnsonfinancialgroup.com>

Desde el resumen del tablero de manos > Hace clic Review Your Strategy

Good Afternoon, Penny T Money  
Last Login: October 25, 2021 5:11 PM EST

Dashboard Manage Performance Loans & Withdrawals Forms & Reports Contact Us Disclosures Plan Selection

My Dashboard

Print

**Projected Retirement Income** →

Needed at age 67: \$5,125/mo  
Strategy estimate: \$2,566/mo

50% of goal

Monthly Income Sources

- Social Security \$1,764
- The Plan \$600
- Outside Savings \$201
- Shortfall \$2,566

**Account Balance**

\$24,588.68

\$18,442 Vested Balance

Rate of Return

**Contribution Rate** →

Pre-Tax	Roth
8%	2%

Dollars

Contributions

Current  30-day  Year-to-date

REVIEW YOUR STRATEGY

MANAGE INVESTMENTS

CHANGE CONTRIBUTION RATE

Hace una marca en 'I agree' > Hacer clic Continue

The screenshot shows a retirement planning tool interface. At the top, there are three main sections: 'Projected Retirement Income' (with sub-sections for 'Needed at age 65: \$6,906/mo' and 'Strategy estimate: \$5,351/mo'), 'Account Balance' (displaying '\$12,538.90'), and 'Contribution Rate' (with 'Pre-Tax 6%' and 'Roth 6%'). A large donut chart indicates '78% of goal'. Below the chart, 'Monthly Income Sources' are listed: Social Security \$3,372, This Plan \$1,500, Outside, and Shortfall \$1,555. A modal dialog box titled 'iJoin Goal-Based Retirement Income' is overlaid on the screen. The dialog contains the text: 'You are leaving this website to enter the iJoin goal-based retirement income experience. iJoin will allow you to model personalized retirement savings strategies and easily implement any desired changes.' Below this text is a checkbox labeled 'I agree', which is highlighted with a yellow box. At the bottom of the dialog are 'CANCEL' and 'CONTINUE' buttons. In the background, a 'Contributions' section shows '30-day' and 'Year-to-date' options.

Desde su foto para la jubilación > Hacer clic Personalize Your Projection > Actualiza Ingresos y Ahorros

Your Retirement Snapshot

Penny, your current investment election is displayed below.

This investment election and your current contribution rate is projected to provide the following income at retirement age. In the next step you can modify other factors to see how they impact your projection.

**Your Investment Election**


[Multiple Investment Portfolio](#)

**Estimated Return: 6.3%**

This is an estimate of long term portfolio growth generated using forecasting data for your actual fund selections or similar fund selections. This is only an estimate and is not a guaranteed indicator of future portfolio performance.

CHANGE INVESTMENT

**Your Projected Income Goal**



**127%**  
of goal

Needed at age 67: **\$5,000/mo.**  
Current estimate: **\$6,368/mo.**  
(not guaranteed)

**Monthly Income Sources**

6% Pre-Tax	6%	Social Security \$3,617	Outside Savings \$490
			Surplus \$1,368

Update Your Income Details

Your Other Savings

PERSONALIZE YOUR PROJECTION

Actualiza los ingresos y otros ahorros de ti y su pareja

### Your Income Factors

What is your current or most recent personal annual salary?

\$45,000.00

Where do you plan to live in retirement?

Wisconsin

Do you want to include household/spousal income and savings in your projections?

No  Yes

Spouse's Date of Birth:

06/04/1963

Spouse's Gender:

Male

What is your spouse's current annual salary?

\$60,000.00

What percentage of their annual income is put towards retirement savings accounts?

3%  Pre-Tax

4%  Post-Tax

CANCEL

OK

### Your Other Savings

Please include information that will help us personalize your retirement picture.

Your current balance in this plan is \$66,085.62

Please update any balances you have in savings accounts outside of this plan below.

Simple View  Detailed View

ENTER ACCOUNT

#### Pre-Tax Savings

401k Plan 

Account Owner: Participant  
Balance: \$6,500 - Last Updated: Oct 25, 2021

#### Roth Savings

Roth IRA 

Account Owner: Participant  
Balance: \$4,000 - Last Updated: Oct 25, 2021

CANCEL

OK

Desde su foto para la jubilación> Hace clic 'Modify Your Savings Strategy'

Your Retirement Snapshot

Penny, your current investment election is displayed below.

This investment election and your current contribution rate is projected to provide the following income at retirement age. In the next step you can modify other factors to see how they impact your projection.

**Your Investment Election**

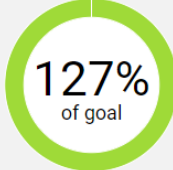
[Multiple Investment Portfolio](#)

**Estimated Return: 6.3%**

This is an estimate of long term portfolio growth generated using forecasting data for your actual fund selections or similar fund selections. This is only an estimate and is not a guaranteed indicator of future portfolio performance.

[CHANGE INVESTMENT](#)

**Your Projected Income Goal**

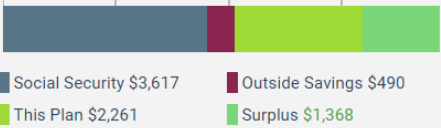


**127%**  
of goal

Needed at age 67:  
**\$5,000/mo.**

Current estimate:  
**\$6,368/mo.**  
(not guaranteed)

**Monthly Income Sources**



6% Pre-Tax	6% Post-Tax (Roth)	Social Security \$3,617	Outside Savings \$490
		This Plan \$2,261	Surplus \$1,368

[MODIFY YOUR SAVINGS STRATEGY](#)

[PERSONALIZE YOUR PROJECTION](#)

Ajusta sus tarifas de contribuciones y/o sus goles que quiere > Hace clic continue

Improve Your Path To Success

### Your Projected Income Goal

127% of goal

Needed at age 67: \$5,000/mo.  
Strategy estimate: \$6,368/mo. (not guaranteed)

Quick Tips Advanced Options

**Increase Your Contribution Rates**

Pre-Tax:  6%

Post-Tax (Roth):  6%

Contribution Type: Percentage  Fixed Dollar

**\$208** estimated impact to current bi-weekly paycheck

Consider Adjusting These

Amount Needed: (per month in retirement) \$ 5,000.00

Retirement Age:  67

Monthly Income Sources

Social Security	\$3,617
Outside Savings	\$490
This Plan	\$2,261
Surplus	\$1,368

Selected Investment Portfolio: Multiple Investment Portfolio  
Estimated Return: 6.3% (not guaranteed)

CHANGE INVESTMENT

CANCEL CONTINUE

Improve Your Path To Success

### Paycheck Estimates

Current Paycheck Retirement Paycheck

**Current Per Paycheck Estimate**

This is an estimated breakdown of your current paycheck if you were to implement the selected savings strategy. Note this is for illustrative purposes only and may not be a fully accurate estimate of your adjusted take-home pay.

Victory Capital Management, Inc. date 06/01/2022 1234	
Pay to the order of Penny Money	\$ 1,269.41
One Thousand Two Hundred Sixty-Nine and 41/100 DOLLARS	
MEMO: Bi-weekly take home pay Your Employer	
C1234567890 0123456789 1234	

Gross Wages	\$1,730.77
Pre-Tax Contribution	-\$103.85
Taxable Income	\$1,626.92
Healthcare or Other Deductions	-\$0.00
Federal Income Taxes	-\$196.00
WI State Income Taxes	-\$57.67
Post-Tax Contribution	-\$103.85
<b>Estimated Net Take Home Pay</b>	<b>\$1,269.41</b>

OK

Improve Your Path To Success

### Paycheck Estimates

Current Paycheck Retirement Paycheck

**Monthly Income In Retirement**

Here's what an estimated -\$208 impact to your current paycheck could mean in monthly retirement income (after taxes). This is only an estimate and the projected amounts are NOT guaranteed.

Future You date 05/17/2052 1234	
Pay to the order of Penny Money	\$ 6,367.84
Six Thousand Three Hundred Sixty-Seven and 84/100 DOLLARS	
MEMO: Monthly Retirement Income Your Savings & Social Security	
C1234567890 0123456789 1234	

Income From This Plan	\$2,260.68
Income From Other Savings	\$490.16
Income From Social Security	\$3,617.00
<b>Estimated Net Monthly Income</b>	<b>\$6,367.84</b>

Your state and federal taxes are estimated to be \$134.03 which has already been taken into account in the above projection

OK

**Estimación del cheque de la para (corriente vs jubilacion)**

Confirma sus cambios que quiere > Hace clic Authorize

Authorize Strategy

Please review and confirm the information below before authorizing your new savings strategy.

Contribution Rate(s)

6% Pre-Tax

8% Post-Tax (Roth)

By clicking Authorize, you will be making a percentage-based contribution each pay period that will automatically adjust with increases or decreases to your salary.

[Click here](#) if you would like to convert this back to a fixed dollar contribution

Investment Choices

75.0% Vanguard Life Growth Fund >

25.0% T. Rowe Price Growth Stock I >

Contact Info

For notification purposes, please verify or enter your email address:



molson@johnsonfinancialgroup.com

Confirm Strategy



I agree to this savings strategy and [associated disclosures](#)

BACK

AUTHORIZE