



Savings Rate

PERFORMANCE SUMMARY

Henry & Henrietta Yolk

AGE 31/29

7.0%

Current Score

Sr

Sr (Savings Rate)

Indicates how much of a person's income is being put away for future expenses, emergencies, and retirement. Savings includes deposits made to retirement accounts, other savings accounts, and extra payments toward debt.

PREPARED BY:

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Savings Rate Details

Total Annual Savings ÷ Total Income Estimate = Sr

\$46,000 ÷ \$656,000 = 7.0%

Savings by Category

Pre-Tax Savings	\$	30,000
After-Tax Savings	\$	6,000
Childrens' Savings	\$	10,000
Cash Savings	\$	-
Extra Debt Payments	\$	-
TOTAL ANNUAL SAVINGS	\$	46,000

Recurring Contributions

Henry's Roth IRA \$6,188	\$6,000 Annually
Henry's 401k \$151,444	\$1,500 Monthly
Henrietta's 401k \$12,978	\$1,000 Monthly
Henry Jr.'s 529 \$5,225	\$5,000 Annually
Henrietta Jr.'s 529 \$5,840	\$5,000 Annually

