

Exit 200?

How Do I “Retire” From “This”????

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Small Business Transition Rate

- Less Than 15%
- Retirement Income
- Taxation (Capital Gains vs. Ordinary)

The FEAR

- The Number One Question????
- Will I Outlive My Money????
- That Depends???

Life Expectancy

1930(s)

- Males 49
- Females 52

2000(s)

- Males 79
- Females 84

Spending Rates

5% Spending Rate

- 30 Yrs/Retirement
- Portfolio Composition
- Approx. 80%
- Growth 60%
- Avg. Yrs Survival of Portfolio 29

7.0% Spending Rate

- 30 Yrs/Retirement
- Portfolio Composition
- Approx. 50%
- Growth 30%
- Avg. Yrs Survival of Portfolio 24

I Get It...But How???

Gifts

- \$13,000/Year
- \$1,000,000/Lifetime
- Cheap Costs

Sales

- Long Term Cap Gain
- Recapture
- Cash Flow

The Big Question

What About My Siblings/Other Kids???

Risk!!!!