

The Nest Egg Guru Engagement App Suite

- Nest Egg Guru Retirement Spending App
- Nest Egg Guru Retirement Savings App
- Nest Egg Guru College Savings App

NestEggGuru

Affordable client-facing apps to help FAs engage and educate clients, build stickier relationships, and improve online visibility.

Password Guru is the ONLY white-labeled password management app for FAs to give to their clients.



“If things go badly in the markets, will we still be okay?”

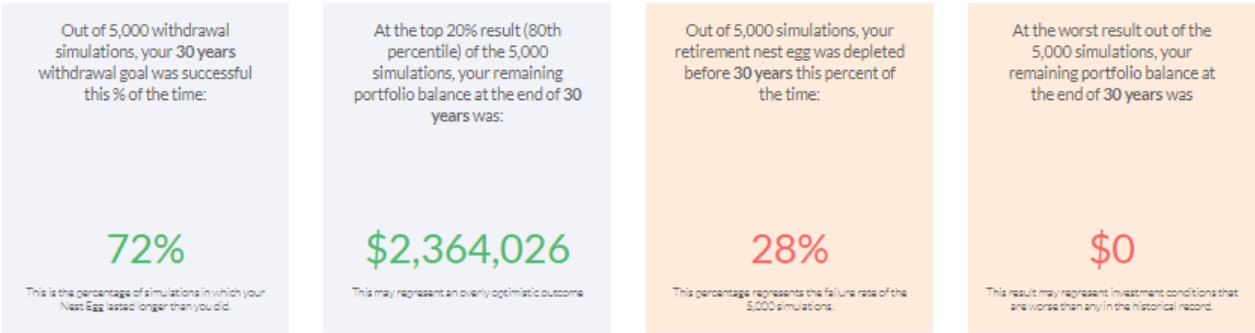
NestEggGuru’s Retirement Spending App helps FAs answer this common client question and make retirement portfolio sustainability uniquely tangible and quantifiable.

- SPENDING APP FEATURES AN ADVANTAGES
- ✓ Realistic down-market simulations not based on “probabilities”
 - ✓ Allows FA to illustrate the impact of current low interest rates
 - ✓ Remaining balances in 5-yr increments makes results tangible
 - ✓ Powerful simulation engine (5,000 sims in 5 seconds)
 - ✓ Modified bootstrap simulations = No Monte Carlo assumptions
 - ✓ Easily test one variable at a time
 - ✓ Test different spending strategies (constant allocation, bonds-first, stocks-first, guardrail)

- Clean, intuitive app design
- 100% white-labeled
- Great lead-gen functionality
- Embed code helps SEO
- Builds client relationships

RETIREMENT SPENDING APP RESULTS SUMMARY

Based upon the personal data you entered and the withdrawal election you made, the Retirement Spending App ran 5,000 simulations using randomly sampled historical monthly index return data in percentages that match your specified retirement allocation. The results from these simulations are summarized as follows:



COMPLETE RETIREMENT NEST EGG SUSTAINABILITY SIMULATION RESULTS

The median remaining balance results represent the the 2,500th best/worst simulation result of the 5,000 total simulations for each 5 year interval. The 10%, 5%, and 1% remaining balances represent the bottom 500th, 250th, and 50th simulation results, respectively. It is important to understand that the percentages do not represent probabilities and are not intended to be predictive. Instead, the simulation results illustrate how your nest egg may fare in retirement if things go badly in the markets.

Remaining Balance...

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Simulation Percentile	After 5 Years	After 10 Years	After 15 Years	After 20 Years	After 25 Years	After 30 Years
80%	\$1,281,879	\$1,506,666	\$1,735,278	\$1,991,970	\$2,158,111	\$2,364,026
60%	\$1,127,827	\$1,217,548	\$1,297,601	\$1,310,944	\$1,269,640	\$1,140,845
Median	\$1,066,817	\$1,104,057	\$1,116,300	\$1,071,569	\$947,081	\$733,389
40%	\$1,003,999	\$1,003,150	\$968,011	\$873,734	\$689,615	\$378,059
20%	\$876,630	\$805,008	\$683,881	\$482,979	\$189,251	\$0
10%	\$789,083	\$678,692	\$518,818	\$268,616	\$0	\$0
5%	\$721,892	\$578,486	\$394,573	\$125,867	\$0	\$0
1%	\$610,579	\$422,239	\$203,907	\$0	\$0	\$0
Worst	\$460,252	\$275,579	\$2,893	\$0	\$0	\$0

Change Input

Reset

PASSWORD GURU



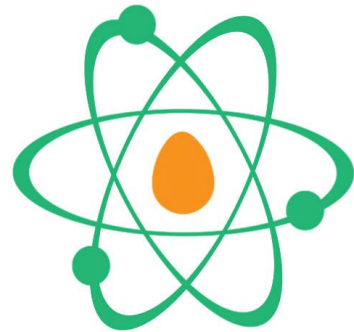
Password Guru is the ONLY password management software that is available for financial advisors to provide as a free service to their clients.

FEATURES

- ✓ 100% White labeled
- ✓ Give Password Guru accounts to an unlimited number of clients
- ✓ Highly functional, intuitive design
- ✓ Clients may easily import and export password lists
- ✓ Easy-to-use multifactor authentication for security

BENEFITS

- Makes your website a hub for clients to visit regularly
- Builds client loyalty and makes the FA-client relationship stickier
- Sets you apart from other financial advisors
- Frequent traffic and long visitor stays boost FA search rankings



Stress Test Your Nest Egg

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