

**Table 4: Case Study Results for Single Individual with \$1 Million**

			Claim Social Security at 62	Claim Social Security at 67	Claim Social Security at 70
25% Stock Allocation	AGI Level Managed		\$50,000	\$50,000	\$50,000
	Wealth Percentile (Age 85)	90th	\$1,946,691	\$1,888,145	\$1,818,764
		50th	\$517,099	\$566,371	\$545,988
		10th	\$151,318	\$218,424	\$242,248
	Legacy Wealth Percentile	90th	\$2,164,382	\$2,181,492	\$2,149,093
		50th	\$71,883	\$272,838	\$391,032
		10th	-\$295,409	-\$94,298	\$61,615
	Success Rate		56.8%	81.4%	94.1%
% of Cases: Legacy is Greater Than When Claiming at 62		n/a	94.1%	89.0%	
50% Stock Allocation	AGI Level Managed		\$50,000	\$50,000	\$50,000
	Wealth Percentile (Age 85)	90th	\$2,542,613	\$2,455,672	\$2,364,817
		50th	\$887,079	\$914,207	\$868,236
		10th	\$309,220	\$363,194	\$374,236
	Legacy Wealth Percentile	90th	\$3,360,570	\$3,299,131	\$3,229,300
		50th	\$628,351	\$803,296	\$899,447
		10th	\$19,553	\$265,432	\$424,925
	Success Rate		91.5%	98.3%	100.0%
% of Cases: Legacy is Greater Than When Claiming at 62		n/a	82.2%	76.3%	
75% Stock Allocation	AGI Level Managed		\$50,000	\$50,000	\$50,000
	Wealth Percentile (Age 85)	90th	\$3,042,744	\$2,903,753	\$2,762,964
		50th	\$1,350,732	\$1,318,091	\$1,261,075
		10th	\$417,023	\$460,227	\$486,584
	Legacy Wealth Percentile	90th	\$4,866,263	\$4,744,408	\$4,694,604
		50th	\$1,529,749	\$1,566,524	\$1,578,574
		10th	\$347,003	\$584,708	\$723,035
	Success Rate		96.6%	99.2%	100.0%
% of Cases: Legacy is Greater Than When Claiming at 62		n/a	67.0%	63.6%	