

Families

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Primary Home

Current Home **First Change of Home** Second Change of Home

Check here if you plan to change homes. Indicate amounts in today's dollars Clear Values

| | | | |
|-----------------------------------|--------|-------------------------------|-------|
| Change of Home | | Rental of New Home | |
| Change in primary home occurs in | 2027 | Monthly rent | 0 |
| State to which you'll move | IL | Other monthly rental expense | 0 |
| Purchase of New Home | | | |
| Purchase price | 330000 | Percent downpayment | 100 % |
| Annual property taxes | 6000 | Mortgage interest rate | 0 % |
| Annual homeowner's insurance | 1000 | Years of mortgage | 1 |
| Annual maintenance and condo fees | 6000 | Points | 0 |
| Closing costs | 10000 | Annual real appreciation rate | 0 % |

Change of Current Home

When asked about your plans to change your primary

own a home, but don't specify that you will sell it, ESPlanner will assume that you will die with the home intact.

If you will use this terminal home equity to pay off the requests and funeral expenses, entered under *Planning*, of the household's last decedent.

If you specify that you will change a home you owns, ESPlanner will automatically sell it at the end of the year of the move. ESPlanner will also calculate any capital gain or loss that you owe.

If you specify that the client will purchase a new home, ESPlanner will automatically save for the specified down-payment; i.e., ESPlanner's saving recommendations will take into account the need to save for the down-payment.