

JA Finance Park

Use with Unit 1, Lesson 6 (Student Workbook page 34)

Investment Planning Calculator

\$50

Taxable Investment

Tax-Deferred Investment

Rate: 12% 10% 8% 6% 4%

12% 10% 8% 6% 4%

Years

10	\$9,814	\$8,993	\$8,259	\$7,600	\$7,009
20	\$34,162	\$28,147	\$23,366	\$19,546	\$16,480
30	\$94,566	\$68,942	\$51,000	\$38,323	\$29,278
40	\$244,425	\$155,827	\$101,549	\$67,835	\$46,569

\$11,617	\$10,328	\$9,208	\$8,235	\$7,387
\$49,957	\$38,286	\$29,647	\$23,218	\$18,400
\$176,496	\$113,966	\$75,015	\$50,477	\$34,818
\$594,121	\$318,839	\$175,714	\$100,072	\$59,295

\$150

Taxable Investment

Tax-Deferred Investment

Rate: 12% 10% 8% 6% 4%

12% 10% 8% 6% 4%

Years

10	\$29,442	\$26,980	\$24,776	\$22,801	\$21,028
20	\$102,485	\$84,442	\$70,097	\$58,639	\$49,441
30	\$283,699	\$206,826	\$153,000	\$114,968	\$87,833
40	\$733,276	\$467,480	\$304,646	\$203,505	\$139,707

\$34,851	\$30,983	\$27,625	\$24,705	\$22,161
\$149,872	\$114,855	\$88,942	\$69,653	\$55,200
\$529,487	\$341,899	\$225,044	\$151,431	\$104,454
\$1,782,363	\$956,517	\$527,142	\$300,217	\$177,885

\$350

Taxable Investment

Tax-Deferred Investment

Rate: 12% 10% 8% 6% 4%

12% 10% 8% 6% 4%

Years

10	\$68,698	\$62,953	\$57,811	\$53,203	\$49,066
20	\$239,132	\$197,031	\$163,561	\$136,825	\$115,363
30	\$661,965	\$482,593	\$356,999	\$268,260	\$204,944
40	\$1,710,978	\$1,090,787	\$710,842	\$474,846	\$325,984

\$81,319	\$72,293	\$64,458	\$57,645	\$51,709
\$349,702	\$267,994	\$207,532	\$162,523	\$128,799
\$1,235,470	\$797,764	\$525,103	\$353,338	\$243,727
\$4,158,847	\$2,231,873	\$1,229,998	\$700,507	\$415,065

\$500

Taxable Investment

Tax-Deferred Investment

Rate: 12% 10% 8% 6% 4%

12% 10% 8% 6% 4%

Years

10	\$98,140	\$89,933	\$82,587	\$76,004	\$70,094
20	\$341,617	\$281,473	\$233,658	\$195,464	\$164,805
30	\$945,664	\$689,419	\$509,999	\$383,228	\$292,777
40	\$2,444,254	\$1,558,267	\$1,015,488	\$678,351	\$465,691

\$98,140	\$103,276	\$92,083	\$82,349	\$73,870
\$341,617	\$382,848	\$296,474	\$232,176	\$183,999
\$945,664	\$1,139,663	\$750,148	\$504,769	\$348,181
\$2,444,254	\$3,188,390	\$1,757,141	\$1,000,724	\$592,951