

TRAK

Version Comparisons

The Retirement Analysis Kit

	Federal	Gap Analysis	401(K)	403(b)	Deluxe	TRAK-Online
Gap Analysis	•	•			•	•
600+ State & Local Pension Plans		•			•	•
Bucket Strategy					•	
DB Plan Overview					•	•
Federal Retirement Plans (CSRS & FERS)	•	•			•	•
Gap Analysis Scenarios					•	
Glide Paths					•	•
Long Term Care Illustrations	•	•			•	•
Pension Max					•	•
Sequence of Returns					•	
Tax Wise Distribution Strategy					•	
TSP Historical Rate of Return	•	•			•	
Quick Gap Analysis			•	•	•	
600+ State & Local Pension Plans			•	•	•	
DB Plan Overview					•	
Glide Paths					•	
Pension Max					•	
Sequence of Returns					•	
Batch Processing			•	•	•	•
Contribution Analysis			•	•	•	•
Group Editing			•	•	•	•
Participant Benchmark Report			•	•	•	•
Participant Gap			•	•	•	•
Paycheck Analysis + 1040 Analysis & Projections			•	•	•	•
Strategic Social Security					•	•
Reports	•	•	•	•	•	•
Select Report Color Scheme & Cover Page					•	•
ADDITIONAL FEATURES			•	•	•	
72(t)			•	•	•	
Annuity/Interest Comparison				•	•	
Asset Allocation/Risk Analysis			•	•	•	
College Funding			•	•	•	
Debt Analyzer			•	•	•	
Interest Calculator (Accumulation/Distribution/Loan)			•	•	•	•
Life Insurance Needs Analysis					•	
Lump Sum Transfer			•	•	•	
Maximum Allowable 403(b)/457 Contribution				•	•	•
Multi-Tier Split Annuity					•	
Pension Max					•	
Product Comparison			•	•	•	
Rate of Return			•	•	•	
RMD			•	•	•	
Roth Conversion			•	•	•	
Stretch IRA			•	•	•	•
Tax Deferral Comparison			•	•	•	