

TRAK

Version Comparisons

The Retirement Analysis Kit

MOST POPULAR CALCULATORS & FEATURES

	Windows Desktop				Cloud
	Gap Analysis	401(k)	403(b)	Deluxe	
Gap Analysis	•			•	•
700+ 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				•	
Average Tax Rate	•			•	❖
Tax Wise Distribution Strategy				•	
Retirement Budget				•	❖
TSP Historical Rate of Return	•			•	❖
Quick Gap Analysis		•	•	•	
700+ State & Local Pension Plans		•	•	•	
DB Plan Overview				•	
Average Tax Rate		•	•	•	
Glide Paths				•	
Pension Max				•	
Sequence of Returns				•	
Batch Processing		•		•	•
Contribution Analysis		•		•	•
Group Editing		•		•	•
Participant Gap		•		•	•
Participant Benchmark Report				•	•
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		•	•	•	
Tax Deferral Comparison		•	•	•	

❖ Features only included in TRAK Online's Gap Analysis Deluxe.