

Annual Recaluation and Decision on Upcoming annual SSA

Update on 11/30/2025

Spreadsheet to see if our SSA can increase by more than inflation.

Do we have More-Than-Enough for our current SSA? If so, I will calculate to a real increase in our SSA.

I enter the numbers for the year in the yellow cells and the spreadsheet calculates the rest.

Basis: \$1 M starting Investment Portfolio

Note: On Nov 30, 2022, I used my Reserve for SSA for our 2023 spending: I sold only the bonds in my Reserve for 2023 spending. I therefore do not show a withdrawal from my Investment Portfolio. It starts the Dec 1 for the next year with the same value as it was on Nov 30.