

Client 1: John Doe

Detail	Value
Age	27
Profession	Software Engineer
Risk Profile	High (Aggressive Growth)
Primary Goals	Buy a house in 5 years; Retire by 60 with \$2M

☐ Account Summary

Account Type	Institution	Current Value
Checking	Chase	\$5,000
Savings	Chase	\$5,000
401(k)	Fidelity	\$50,000
Brokerage	Robinhood	\$30,000
Crypto Wallet	Coinbase	\$10,000
Total Portfolio	—	\$100,000

☐ Asset Allocation

Asset Class	% Allocation	Approx. Value
U.S. Stocks	65%	\$65,000
International Stocks	10%	\$10,000

Bonds	5%	\$5,000
Cash	10%	\$10,000
Crypto	10%	\$10,000

☐ **Simulated 401(k) Growth (Past 5 Years)**

Year Estimated Value

2019 \$10,000

2020 \$18,000

2021 \$28,000

2022 \$42,000

2023 \$50,000

☐ **Monthly Contributions**

Destination Amount

401(k) \$800

Savings \$200

Brokerage \$200

Crypto Wallet \$100

☐ **Advisor Summary**

- John is building a solid investment base with strong early contributions.
- His portfolio is growth-oriented and well-diversified for his age.
- **Next steps:**
 - Slightly increase bond exposure for downside protection.
 - Open a Roth IRA and contribute annually.
 - Investigate employer stock purchase options and ESPP.