

□ □ Client 3: Alex Johnson

Detail	Value
Age	36
Profession	Vice President, Investment Banking
Risk Profile	Moderate
Primary Goals	Buy an investment property; Retire by 55 with \$5M

□ Account Summary

Account Type	Institution	Current Value
Checking	Wells Fargo	\$20,000
Savings	Wells Fargo	\$30,000
401(k)	Fidelity	\$300,000
Brokerage	Fidelity	\$200,000
Crypto Wallet	Kraken	\$10,000
Total Portfolio	—	\$560,000

□ Asset Allocation

Asset Class	% Allocation	Approx. Value
U.S. Stocks	55%	\$308,000
International Stocks	5%	\$28,000

Bonds	20%	\$112,000
Cash	15%	\$84,000
Crypto	5%	\$28,000

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

Year Estimated Value

2019	\$70,000
2020	\$120,000
2021	\$180,000
2022	\$250,000
2023	\$300,000

☐ Monthly Contributions

Destination Amount

401(k)	\$1,600
Brokerage	\$500
Savings Fund	\$1,000

☐ Advisor Summary

- Alex is in a strong position with a high income and a well-balanced portfolio.

- He is actively saving for an investment property while still growing long-term wealth.
- **Next steps:**
 - Optimize savings vehicles for property purchase (e.g., high-yield savings, CDs).
 - Continue shifting small portions into tax-advantaged bonds.
 - Schedule an estate plan and umbrella insurance consultation as net worth grows.