Client Details

Client Name: David Watts

Client Mobile: 2815141129

Client Age: 33

Co-Client Name:

Co-Client Mobile:

Co-Client Age:

Retirement Plan Client Age: 60

Retirement Plan Co-Client Age:

Social Benefit Client: 60

Social Benefit Co-Client:

Pension Benefit Client: 60

Pension Benefit Co-Client:

Other IncomeClient Client: 50000

Other IncomeClient Co-Client:

Estimated Annual Retirement Expense ($ or % of current salary) Client: 5000

Estimated Annual Retirement Expense ($ or % of current salary) Co-Client:

Assets - 401(k), 403(b), 457 : Current Value - 300 , Annual Contributions - 30

Assets - Traditional, SEP and SIMPLE IRAs : Current Value - 200 , Annual Contributions - 20

Assets - Roth IRA, Roth 401(k) : Current Value - 100 , Annual Contributions - 10

Assets - Brokerage/non-qualified accounts : Current Value - 500 , Annual Contributions - 50

Assets - Cash/bank accounts : Current Value - 500000 , Annual Contributions -

Assets - Annuities : Current Value - 2800 , Annual Contributions - 150

Assets - 529 Plans : Current Value - 2850 , Annual Contributions - 150

Assets - Home : Current Value - 5000000 , Annual Contributions -

Assets - Other Real Estate : Current Value - 1000000 , Annual Contributions -

Assets - Business : Current Value - 300000 , Annual Contributions -

Assets - Other : Current Value - 200000 , Annual Contributions -

Liabilities - Mortgage(s) : Balance - 100000 , Interest - 12 , Monthly - 500

Liabilities - Credit Card(s) : Balance - 400 , Interest - 10 , Monthly - 400

Liabilities - Other loans : Balance - 50000 , Interest - 8 , Monthly - 300

Check Will: True

Check Healthcare: True

Check Attorney: True

Check Trust: True

Life Insurance Client: Benefit - 500000 Monthly Pay - 300

Life Insurance Co-Client: Benefit - Monthly Pay -

Disable Income Client - 200000

Disable Income Co-Client -

Long Term Client: Benefit - 800000 Monthly Pay - 400

Investment Amount Available : 80000

Goal: Travel Cost: 300000 When: 2030

Income Source: Bonus Amount: 50000