Client Details

Client Name: Emilly Watts

Client Mobile: 8887766991

Client Age: 33

Co-Client Name:

Co-Client Mobile:

Co-Client Age:

Retirement Plan Client Age: 65

Retirement Plan Co-Client Age:

Social Benefit Client: 19/9/2054

Social Benefit Co-Client:

Pension Benefit Client: 19/9/2054

Pension Benefit Co-Client:

Other IncomeClient Client: 10000

Other IncomeClient Co-Client:

Estimated Annual Retirement Expense ($ or % of current salary) Client: 4000

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

Assets - 401(k), 403(b), 457 : Current Value - 2000 , Annual Contributions - 200

Assets - Traditional, SEP and SIMPLE IRAs : Current Value - 3000 , Annual Contributions - 300

Assets - Roth IRA, Roth 401(k) : Current Value - 1500 , Annual Contributions - 100

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

Assets - Cash/bank accounts : Current Value - 200000 , Annual Contributions - 80000

Assets - Annuities : Current Value - , Annual Contributions -

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

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

Assets - Other Real Estate : Current Value - 150000 , Annual Contributions -

Assets - Business : Current Value - 400000 , Annual Contributions - 90000

Assets - Other : Current Value - 50000 , Annual Contributions -

Liabilities - Mortgage(s) : Balance - 300000 , Interest - 12 , Monthly - 2000

Liabilities - Credit Card(s) : Balance - 700 , Interest - 3.5 , Monthly - 700

Liabilities - Other loans : Balance - 18000 , Interest - 6 , Monthly - 800

Check Will: True

Check Healthcare: True

Check Attorney: True

Check Trust: True

Life Insurance Client: Benefit - 20000 Monthly Pay - 200

Life Insurance Co-Client: Benefit - Monthly Pay -

Disable Income Client - 10000

Disable Income Co-Client -

Long Term Client: Benefit - 50000 Monthly Pay - 500

Goal: Home Cost: 700000 When: 2030

Income Source: Business Amount: 100000