Client Details

Client Name: Emilly Watts

Client Mobile: 8728191592

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: 20/9/2054

Social Benefit Co-Client:

Pension Benefit Client:

Pension Benefit Co-Client:

Other IncomeClient Client: 4000

Other IncomeClient Co-Client:

Estimated Annual Retirement Expense ($ or % of current salary) Client: 3000

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

Assets - 401(k), 403(b), 457 : Current Value - 3000 , Annual Contributions -

Assets - Traditional, SEP and SIMPLE IRAs : Current Value - 2000 , Annual Contributions -

Assets - Roth IRA, Roth 401(k) : Current Value - 4000 , Annual Contributions -

Assets - Brokerage/non-qualified accounts : Current Value - 3500 , Annual Contributions -

Assets - Cash/bank accounts : Current Value - 100000 , Annual Contributions -

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 - , Annual Contributions -

Assets - Business : Current Value - , Annual Contributions -

Assets - Other : Current Value - , Annual Contributions -

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

Liabilities - Credit Card(s) : Balance - 400 , Interest - 3.5 , Monthly - 400

Liabilities - Other loans : Balance - 40000 , Interest - 6 , Monthly - 500

Check Will: True

Check Healthcare: True

Check Attorney: True

Check Trust: True

Life Insurance Client: Benefit - 30000 Monthly Pay - 300

Life Insurance Co-Client: Benefit - Monthly Pay -

Disable Income Client - 20000

Disable Income Co-Client -

Long Term Client: Benefit - 50000 Monthly Pay - 500

Goal: Home Cost: 500000 When: 2030

Goal: Travel Cost: 30000 When: 2028

Income Source: Employment Amount: 100000