Client Details

Client Name: Rohit Sharma

Client Mobile: 264

Client Age: 36

Co-Client Name:

Co-Client Mobile:

Co-Client Age:

Retirement Plan Client Age: 40

Retirement Plan Co-Client Age:

Social Benefit Client: 40

Social Benefit Co-Client:

Pension Benefit Client: 40

Pension Benefit Co-Client:

Other IncomeClient Client: 10000

Other IncomeClient Co-Client:

Estimated Annual Retirement Expense ($ or % of current salary) Client: 1000

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

Assets - 401(k), 403(b), 457 : Current Value - 300 , Annual Contributions - 15

Assets - Traditional, SEP and SIMPLE IRAs : Current Value - 200 , Annual Contributions - 15

Assets - Roth IRA, Roth 401(k) : Current Value - 500 , Annual Contributions - 28

Assets - Brokerage/non-qualified accounts : Current Value - 150 , Annual Contributions - 28

Assets - Cash/bank accounts : Current Value - 500000 , Annual Contributions - 30000

Assets - Annuities : Current Value - 1000 , Annual Contributions -

Assets - 529 Plans : Current Value - 3200 , Annual Contributions -

Assets - Home : Current Value - 1000000 , Annual Contributions -

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

Assets - Business : Current Value - 30000 , Annual Contributions -

Assets - Other : Current Value - 49090 , Annual Contributions -

Liabilities - Mortgage(s) : Balance - 1000 , Interest - 10 , Monthly - 100

Liabilities - Credit Card(s) : Balance - 400 , Interest - 8 , Monthly - 400

Liabilities - Other loans : Balance - 500 , Interest - 6 , Monthly - 100

Check Will: True

Check Healthcare: True

Check Attorney: True

Check Trust: True

Life Insurance Client: Benefit - 400000 Monthly Pay - 400

Life Insurance Co-Client: Benefit - Monthly Pay -

Disable Income Client - 20000

Disable Income Co-Client -

Long Term Client: Benefit - 40000 Monthly Pay - 400

Goal: Travel Cost: 50000 When: 2030

Income Source: Bonus Amount: 100000

Investment Amount Available : 800000