

Household Summary

Prepared for Keith and Andrea McElroy

Prepared on February 22, 2025

Household

Keith, 65 Andrea, 53

Primary Residence: Own

2117 Pleasant Grove Blvd, Roseville, CA 95747

Estimated Property Value: \$500,000

Mortgage / Property Loan Total: \$100,000

Home Equity: \$400,000

Current Income: \$110,000 / yr

Keith: \$100,000 / yr

Andrea: \$10,000 / yr

Income Tax:

Filing Status: Married Filing Separately

Keith: Marginal Tax Rate 31.30%, Effective Tax Rate 23%

Andrea: Marginal Tax Rate 11.00%, Effective Tax Rate 11%

Goals

Household Retirement Goal: Keith Save for Retirement Needs

Target Year: 2027

Target Amount: \$82,500 / yr