

## Section III: Recurring Income Not Associated with Accounts or Assets

**3. Recurring Income Not Associated with Accounts or Assets***Income 1*

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Relationship: CHILD  
Name: Jane Doe  
Income Type: WAGES  
Gross Monthly Income: \$99,999.99  
Payer: Generic Company, LLC

*Income 2*

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Relationship: OTHER  
Relationship Type: Cousin  
Name: Sam Jenkins  
Income Type: OTHER  
Other Income Type: Stocks  
Gross Monthly Income: \$99.00  
Payer: Investment Company

*Income 3*

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Relationship: VETERAN  
Income Type: SOCIAL\_SECURITY  
Gross Monthly Income: \$102.33  
Payer: Social Security Administration

*Income 4*

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Relationship: SPOUSE  
Income Type: RETIREMENT\_PENSION  
Gross Monthly Income: \$1,099.99  
Payer: Pension Benefit Management

*Income 5*

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Relationship: PARENT  
Name: Edmund Doe  
Income Type: CIVIL\_SERVICE  
Gross Monthly Income: \$12,345.67  
Payer: Personnel Management

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*Income 6*

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Relationship: CUSTODIAN  
Name: Sam Doe  
Income Type: UNEMPLOYMENT  
Gross Monthly Income: \$1,000.00  
Payer: Agency of Unemployment

## Section V: Income and Net Worth Associated with Owned Assets

**5. Income and Net Worth Associated with Owned Assets***Asset 1*

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Relationship: CUSTODIAN  
Name: Jim Brown  
Asset Type: FARM  
Gross Monthly Income: \$5,555.55  
Owned Portion Value: \$5,555,555.55

*Asset 2*

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Relationship: OTHER  
Relationship Type: Friend  
Name: Brandon Jones  
Asset Type: BUSINESS  
Gross Monthly Income: \$999.99  
Owned Portion Value: \$10,000.00

*Asset 3*

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Relationship: PARENT  
Name: Edmund Doe  
Asset Type: RENTAL\_PROPERTY  
Gross Monthly Income: \$123.45  
Owned Portion Value: \$12,345.67

*Asset 4*

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Relationship: CUSTODIAN  
Name: Jim Brown  
Asset Type: FARM  
Gross Monthly Income: \$1,000.00  
Owned Portion Value: \$12,345.67

## Section VI: Income and Net Worth Associated with Royalties and Other Properties

**6. Income and Net Worth Associated with Royalties and Other Properties***Royalty/Property 1*

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Relationship: SPOUSE  
Income Type: Rental  
Income Generation Method: Other  
Gross Monthly Income: \$12,345.67  
Fair Market Value: \$12,345,678.91  
Can Be Sold: false  
Mitigating Circumstances: Contractual obligations

*Royalty/Property 2*

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Relationship: SPOUSE  
Income Generation Method: Intellectual Property  
Gross Monthly Income: \$100.00  
Fair Market Value: \$1,000.00  
Can Be Sold: true

*Royalty/Property 3*

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Relationship Type: Sibling  
Relationship: OTHER  
Name: John Smith  
Income Generation Method: Use Of Land  
Gross Monthly Income: \$123.00  
Fair Market Value: \$1,234.00  
Can Be Sold: true

*Royalty/Property 4*

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Relationship: PARENT  
Name: John Doe  
Income Generation Method: Minerals / Lumber  
Gross Monthly Income: \$100.00  
Fair Market Value: \$300.00  
Can Be Sold: true

## Section VII: Asset Transfers

**7. Asset Transfers***Asset Transfer 1*

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Relationship:	OTHER
Relationship Type:	Second cousin twice removed of my mother in law
Sale Price:	\$823,456,700.89
Capital Gain:	\$723,456,700.89
Transfer Method:	OTHER
Other Transfer Method:	Earned income from doing work on my siblings house to clean in
What Was Transferred:	Clothes from my grandmothers attic which have been passed down through the family and are priceless - value estimated
New Owner Name:	JohnsonbergerheimerJohnathan JacobJingleheimerSchmidt Jr.
Relationship to New Owner:	Sibling
Sale Reported to IRS:	0
Fair Market Value:	\$100,000,000.00

*Asset Transfer 2*

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Relationship:	OTHER
Relationship Type:	Cousin
Sale Price:	\$8,234,567.89
Capital Gain:	\$7,234,567.89
Transfer Method:	OTHER
Other Transfer Method:	Earned
What Was Transferred:	Clothes
New Owner Name:	John Doe Jr.
Relationship to New Owner:	Sibling
Sale Reported to IRS:	0
Fair Market Value:	\$1,000,000.00

*Asset Transfer 3*

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Relationship:	CHILD
Sale Price:	\$100.00
Capital Gain:	\$0.00
Transfer Method:	GIFTED
What Was Transferred:	Artwork
New Owner Name:	Jacob Doe Sr.
Relationship to New Owner:	Aunt
Sale Reported to IRS:	1
Fair Market Value:	\$123.12

*Asset Transfer 4*

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Relationship:	PARENT
Sale Price:	\$2,000.00
Capital Gain:	\$200.99
Transfer Method:	TRADED
What Was Transferred:	Bike
New Owner Name:	John Doe Jr.
Relationship to New Owner:	Brother
Sale Reported to IRS:	0
Fair Market Value:	\$1,800.99

## Section VIII: Trusts

**8. Trusts***Trust 1*

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Date Established:	1982-02-02
Market Value:	\$500,000.00
Trust Type:	IRREVOCABLE
Added Funds:	false
Receiving Income from Trust:	false
Used for Medical Expenses:	false
Trust Established for Veterans Child:	false
Additional Authority or Control of Trust:	false

*Trust 2*

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Date Established:	1982-02-02
Market Value:	\$9,000,000.00
Trust Type:	BURIAL
Added Funds:	true
Date Added:	1985-02-01
Amount Added:	\$200.12
Receiving Income from Trust:	true
Annual Income:	\$80,000.00
Used for Medical Expenses:	true
Monthly Medical	\$123,456.78
Reimbursement:	
Trust Established for	true
Veterans Child:	
Additional Authority or	true
Control of Trust:	

## Section IX: Annuities

**9. Annuities***Annuity 1*

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Date Established:	2020-01-01
Market Value:	\$1,234,568.89
Added Funds:	true
Date Added:	2022-02-02
Amount Added:	\$2,222,222.22
Revocable or Irrevocable:	true
Receiving Income from	true
Annuity:	
Annual Received Income:	\$1,222,333.44
Can Be Liquidated:	true
Surrender Value:	\$5,666,777.88

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*Annuity 2*

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Date Established: 1920-01-01  
Market Value: \$123.45  
Added Funds: false  
Revocable or Irrevocable: false  
Receiving Income from: false  
Annuity:  
Can Be Liquidated: false

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**Section X: Assets Previously Not Reported****10. Assets Previously Not Reported***Unreported Asset 1*

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Asset Owner Relationship: VETERAN  
Asset Type: Cash  
Owned Portion Value: \$11,222,333.44  
Asset Location: Financial institution

*Unreported Asset 2*

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Asset Owner Relationship: SPOUSE  
Asset Type: Art  
Owned Portion Value: \$123.45  
Asset Location: 123 Main St

*Unreported Asset 3*

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Asset Owner Relationship: CHILD  
Asset Type: Coins  
Owned Portion Value: \$10.00  
Asset Location: 123 Main St

*Unreported Asset 4*

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Asset Owner Relationship: PARENT  
Asset Type: Chandelier  
Owned Portion Value: \$2,000.00  
Asset Location: 123 Main St

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*Unreported Asset 5*

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Asset Owner Relationship: OTHER  
Asset Type: Eggs  
Owned Portion Value: \$2,345.67  
Asset Location: Henhouse

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**Section XI: Discontinued or Irregular Income****11. Discontinued or Irregular Income***Discontinued Income 1*

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Recipient Relationship: OTHER  
Other Relationship: Sibling  
Recipient Name: John Smith  
Income Payer: Banking America  
Income Type: Dividends  
Income Frequency: ONE\_TIME  
Date Income Last Paid: 01/01/2022  
Gross Annual Amount: \$123,456.78

*Discontinued Income 2*

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Recipient Relationship: CUSTODIAN  
Recipient Name: Brandon Johnson  
Income Payer: George Smith  
Income Type: Interest  
Income Frequency: IRREGULAR  
Date Income Last Paid: 05/01/2000  
Gross Annual Amount: \$200,000.00

*Discontinued Income 3*

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Recipient Relationship: VETERAN  
Income Payer: Banking America  
Income Type: Payments  
Income Frequency: RECURRING  
Date Income Last Paid: 05/01/1920  
Gross Annual Amount: \$123.45



## Section XII: Waiver of Receipt of Income

**12. Waiver of Receipt of Income***Income Receipt Waiver 1*

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Relationship: CUSTODIAN  
Recipient Name: George Bankman  
Income Payer: Bank of America  
Expected Income: \$123,567.90  
Date Payments Will Resume: 04/01/2026  
Payment Will Not Resume: NO  
Waived Gross Monthly Income: \$123,456.78

*Income Receipt Waiver 2*

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Relationship: PARENT  
Recipient Name: John Smith  
Income Payer: Bank of America  
Payment Will Not Resume: YES  
Waived Gross Monthly Income: \$100.00

*Income Receipt Waiver 3*

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Relationship: VETERAN  
Income Payer: Banking Place  
Payment Will Not Resume: YES  
Waived Gross Monthly Income: \$222.22