

**Date** 6/10/26  
**Last Name** Sample  
**First Name** Joseph **Age** 32  
**Client**  
**Spouse** Sally **Age** 36  
**Child** William **Age** 10  
**Child** Charlotte **Age** 7  
**Child** Joan **Age** 2  
**Child**  
**Occupation**  
**Client** Retail Store Mngr.  
**Spouse** Medical Billing  
**Client Income** \$68,000  
**Spouse Income** \$72,000  
**Total Income** \$140,000  
**% of Income Saved** 10%  
**Total Assets** \$619,000

**Additional Information**  
 Company Stock offered EOY as a bonus. Est. 8000 Yr.  
 Extra to Principle on Mortgage  
 Both have 50% match up to max deposit

**Debt**

Debt Type	Rate	Months Left	Monthly Payment	Unpaid Balance
H15	8.15	132 M.	843	286,000
Auto Lease			475	None
Auto Lease			310	None
CC	31.15	84	\$700	\$21,000
<b>Total</b>				

<b>Vehicle Insurance</b> 100/300/100 500	<b>Property Insurance</b> 300,000 R 1000	<b>Liability Insurance</b> NONE
<b>Disability Insurance</b>	<b>Medical Insurance</b> LIFE TIME BENEFIT \$10,000	<b>Government Plans</b> FULL BENEFIT NO
<b>Wills &amp; Documents</b> NONE	<b>Trusts &amp; Ownership</b> NONE NONE	<b>Life Insurance</b> \$136,000 (GT) \$144,000 (GT)
<b>WCA/Checking</b> \$2800 1.10	<b>Savings</b>	<b>Credit Union</b>
<b>Savings Bonds</b>	<b>Certificates</b>	<b>Money Market</b>
<b>Tax Deferred</b> 224,465. (K) 9.37%	<b>Tax Free</b>	<b>Tax Deductible</b>
<b>Government Bonds</b>	<b>Corporate Bonds</b>	<b>Municipal Bonds</b>
<b>Preferred Stocks</b>	<b>Blue Chip Stocks</b> 47,000	<b>Growth Securities</b>
<b>Collectibles</b>	<b>Real Estate</b> 486,000 1.5	<b>Business/Shelters</b>

