asset+map

Asset-Map®

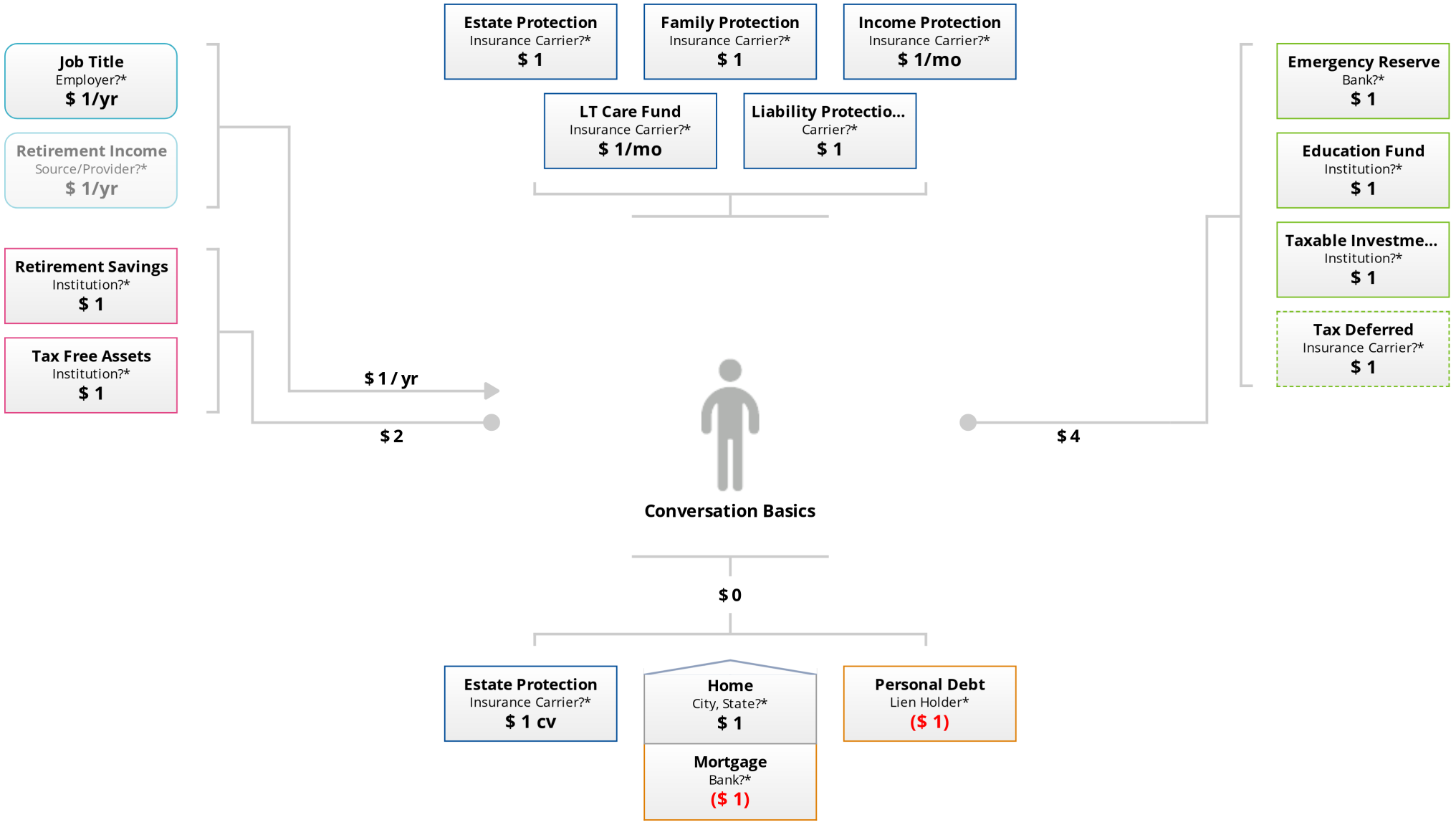
MS Building Blocks

March 2021

Lead Advisor
Michael Advisor, CFP®
Financial Professional
Asset-Map
michael@asset-map.com

Please see the last page of this report for important information and disclosures.

Conversation Basics (4e) Primary
Income Sources (4e) Family
Residence + Mortgage (4e) Family
Non-Retirement Accts (4e) Family
College Savings Plans (4e) Family
Retirement Plans (4e) Family
Liabilities + Debts (4e) Family
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Disability Policies (4e) Family
Long-term Care Policies (4e) Family
Personal Property Casualty (4e) Family
Employer Benefits Plans (4e) Other
Tangible Assets (4e) Other
Business Policies (4e) Other
Business Property Casualty (4e) Other



Cash Flow | Real Estate | Retirement Asset | Non-Retirement Asset | Liability | Insurance | Owned By Another | Deferred Annuity | Stencil

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Long-term Care
Insurance Carrier?*
$ 1/mo



Long-term Care Policies

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Tangible Assets

$ 2

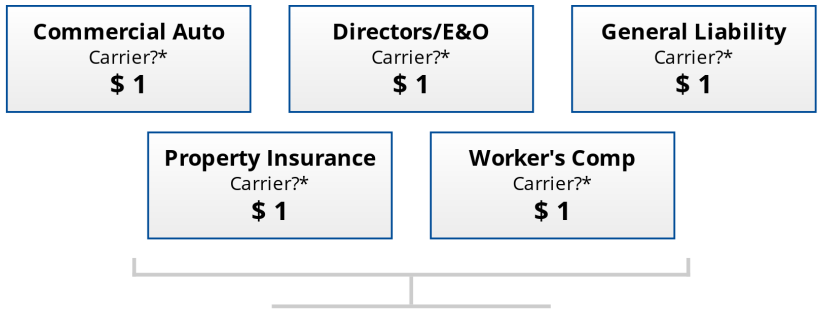
Art/Collectibles
Location?*
$ 1

Jewelry
Location?*
$ 1

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Business Property Casu...

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Business Policies (4e) Other
Business Property Casualty (4e) Other

Auto Policy
Carrier?*
$ 1

Dwelling Policy
Carrier?*
$ 1

Homeowners
Carrier?*
$ 1

Liability Umbrella
Carrier?*
$ 1

Personal Effects
Carrier?*
$ 1

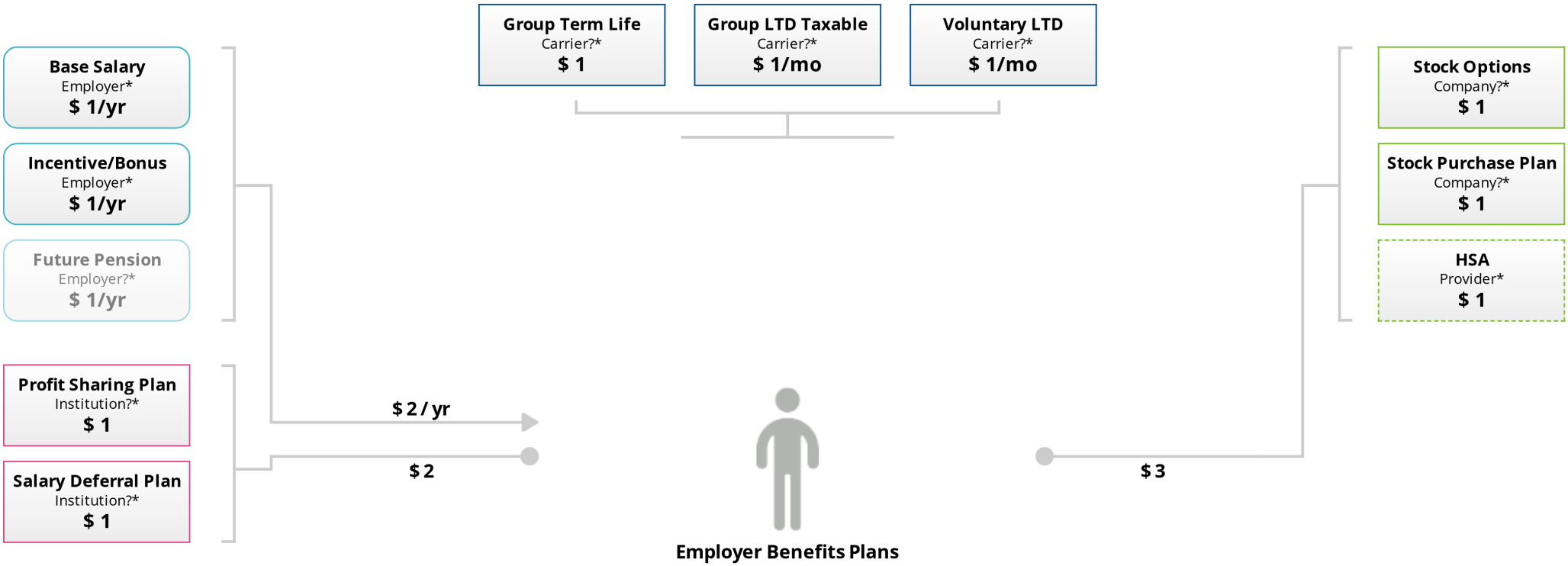


Personal Property Casu...

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Business Policies (4e) Other
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Buy Sell Term
Insurance Carrier?*
$ 1

Golden Handcuffs
Insurance Carrier?*
$ 1

Key Person Term
Insurance Carrier?*
$ 1

Executive LTD
Insurance Carrier?*
$ 1/mo



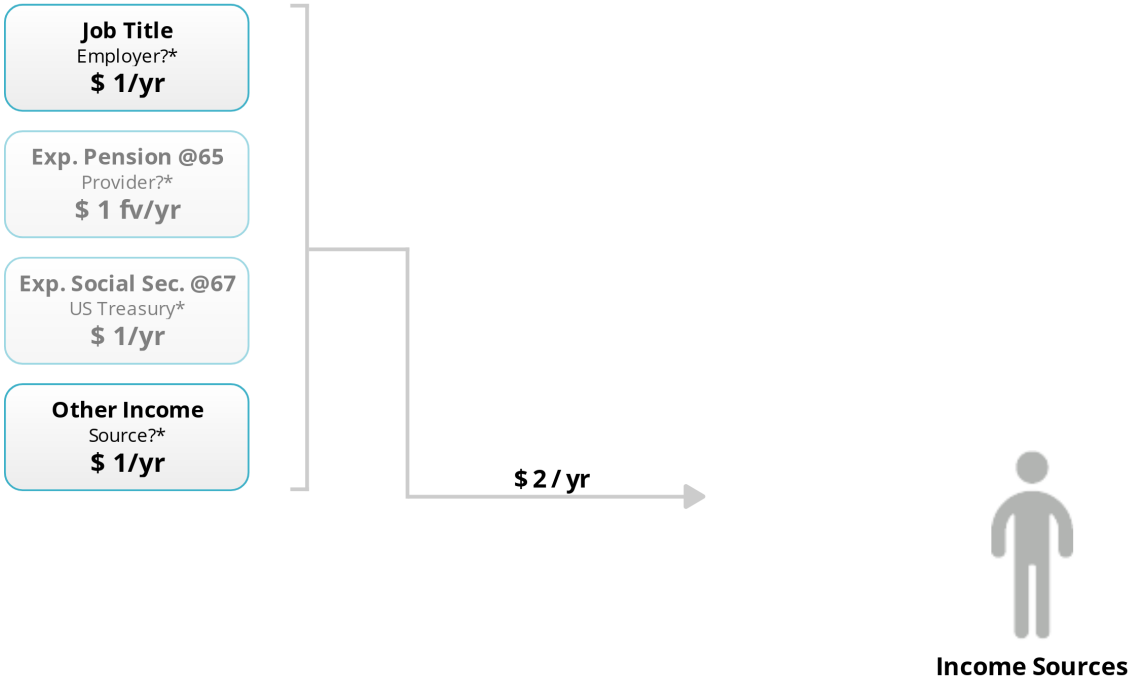
Business Policies

$ 1

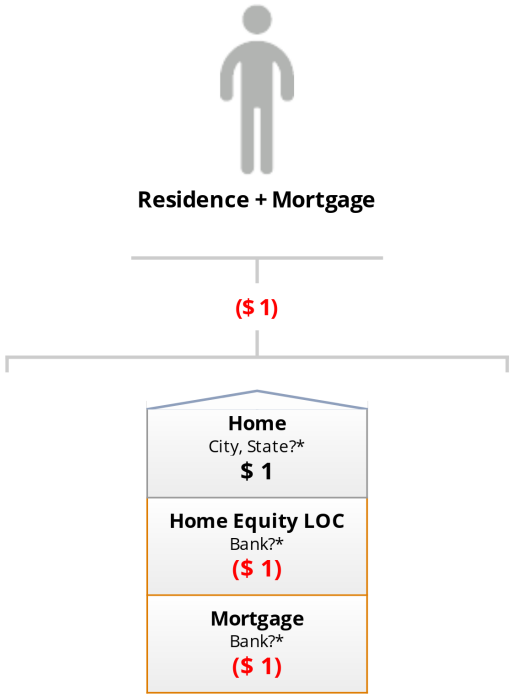
Golden Handcuffs
Insurance Carrier?*
$ 1 cv

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Business Policies (4e) Other
Business Property Casualty (4e) Other



Non-Retirement Accts

$ 4

Checking
Bank?*
$ 1

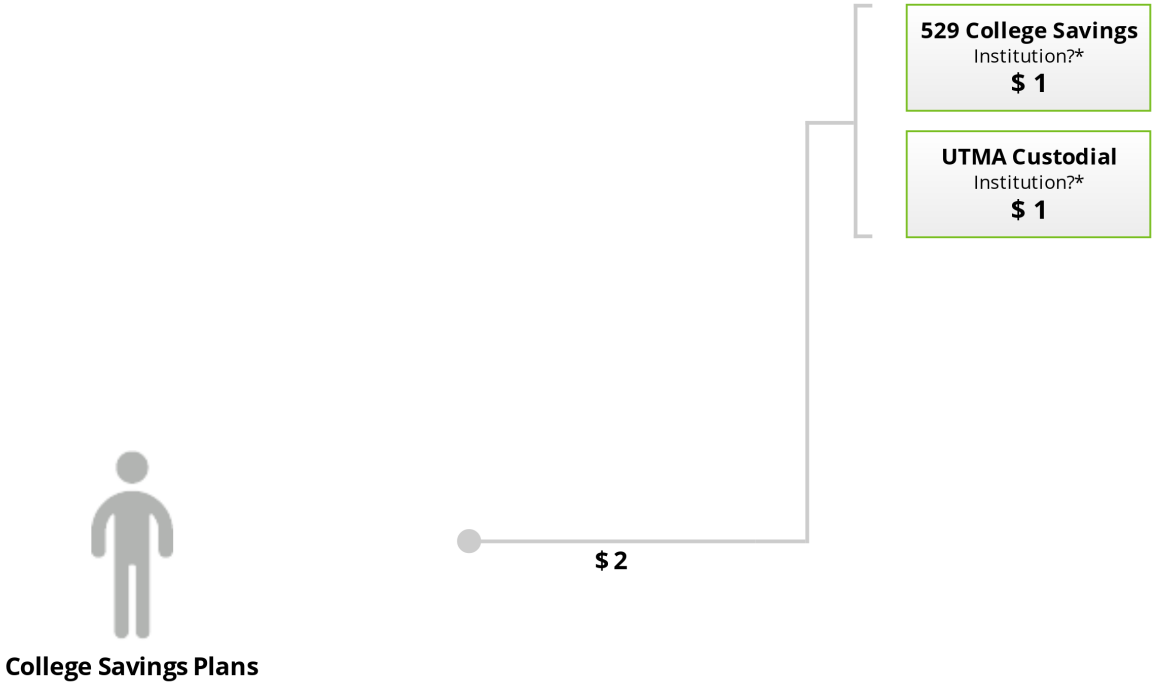
Savings/Reserve
Bank?*
$ 1

Brokerage Account
Institution?*
$ 1

Investments
Institution?*
$ 1

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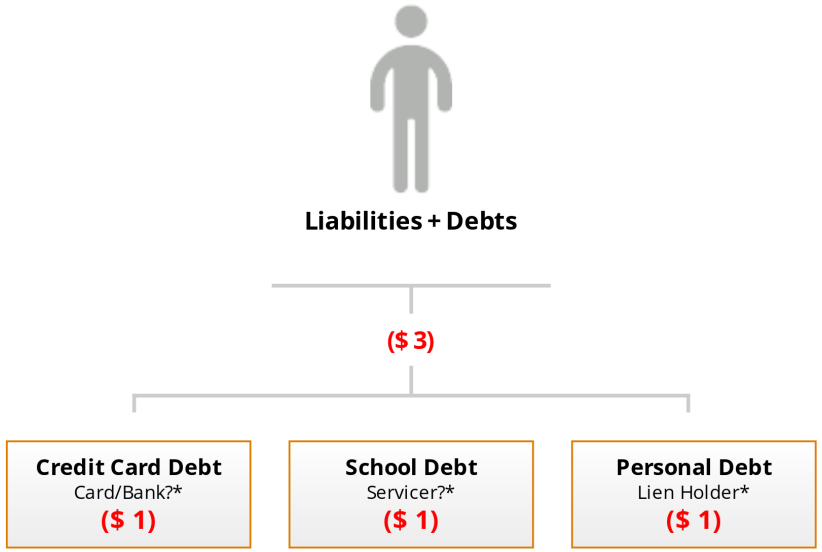
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Group Term Life
Insurance Carrier?*
$ 1

Permanent Life
Insurance Carrier?*
$ 1

Personal Term Life
Insurance Carrier?*
$ 1



Life Insurance Policies

$ 1

Permanent Life
Insurance Carrier?*
$ 1 cv

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Group LTD Taxable
Insurance Carrier?*
$ 1/mo

Indiv. LTD Tax-free
Insurance Carrier?*
$ 1/mo



Disability Policies

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