Get Started Stencil (Memb... • Oct 2022 Lead Advisor: Kirsty Du Toit WORK.THAT. MATTERS. Get Started (48e)
Primary 12. Child? Add here (3e)
Dependent 13. Business? Trust? Add here Close Corporation 1. START HERE 5. Other Assets? Look in "Notes" tab Investments / Art / etc.\* R 1/yr R 1 2. Other Incomes? No? Click the trashcan ... R 1/yr 9. Life Insurance? 10. Disability polic... 11. Severe Illness? ^ choose which type ^ Group or personal? Fill in the details 3. Other Income? R 1/mo R 0 R 1 Look in "Notes" tab R 1/yr 4. Retirement Fun... Fill in the details R3/yr R 1 R 1 R 1 **Get Started** 12/12/1973 (e) (R 1) 6. Liabilities? 7. House?

Do they own or rent?

R 1

8. If they own...
Remaining Bond?
(R 1)

Insurance

Owned By Another

Deferred Annuity

Stencil

CC debt / loans / etc.

(R 1)

Non-Retirement Asset

Liability

Cash Flow

Real Estate

Retirement Asset