- **Robert Buchanan (67)** Primary
- **Betty Buchanan (68)** Spouse
- **Sophia Buchanan (24)** Dependent
- **Teddy Buchanan (22)** Dependent
- **CPA - Nick Sampson (56e)** Accountant
- **Attorney - Jill Holden (56e)** Attorney
- **Buchanan Family Trust** Trust - Irrevocable

**Executive VP**
Nomura Securities*
**$ 480,000/yr**

**Annual Bonus**
Nomura Securities*
**$ 240,000/yr**

**Exp Pension @ 65**
Nomura Securities*
**$ 70,000/yr fv**

**Rental Income**
Mango Street Apts.*
**$ 20,000/yr** (50%)

**Social Security**
estimate @ 67*
**$ 36,000/yr fv**

**VUL**
AXA Equitable*
**$ 854,000**

**Group Term Life**
Nomura Group*
**$ 180,000**

**ILIT (Term to 2038)**
Owned by Trust*
**$ 1,500,000**

**Group Disability**
Nomura Group*
**$ 10,000/mo**

**Group Term Life**
General Hospital*
**$ 50,000**

**UL w/ LTC**
Mutual Life*
**$ 500,000**

**Group Disability**
General Hospital*
**$ 6,000/mo**

**LTC Rider (UL)**
Mutual Life*
**$ 10,000/mo**

**Physician**
General Hospital*
**$ 170,000/yr**

**Income Benefit @67**
Mass Mutual*
**$ 23,049/yr fv**

**Rental Income**
Mango Street Apts.*
**$ 20,000/yr** (50%)

**Social Security**
estimate @ 67*
**$ 36,000/yr fv**

**$ 776,000 / yr**

**$ 2,300,010**

**Robert Buchanan**
08/18/1955

**Betty Buchanan**
03/14/1955

**$ 226,000 / yr**

**$ 1,154,000**

**Active 401k**
Fidelity*
**$ 1,460,000**

**Traditional IRA**
Prudential*
**$ 500,010**

**Brokerage Account**
AXA Advisors*
**$ 230,000**

**Teddy's 529**
John Hancock*
**$ 150,000**

**Stock Options (NQ)**
Nomura*
**$ 623,000**

**Cash**
Wells Fargo*
**$ 50,000**

**VUL**
AXA Equitable*
**$ 60,000 cv**

JOINT
**$ 3,720,000**

**Joint Brokerage**
Fidelity*
**$ 50,000**

**Joint Brokerage**
Schwab*
**$ 2,600,000**

**Vacation Home**
Carribean*
**$ 730,000**

**Apartments**
Mango Street Apts.*
**$ 720,000**

**Home**
Penny Lane*
**$ 850,000**

**Mortgage**
CITI Bank*
**($ 500,000)**

**IRA Rollover**
LPL*
**$ 210,000**

**Active 403b**
Vanguard*
**$ 800,000**

**Expected Inherita...**
Grandma Trust*
**$ 3,000,000 fv**

**Deferred Annuity**
Mass Mutual*
**$ 130,000**

**Sophia's 529**
Putnam*
**$ 45,000**

**UL w/ LTC**
Mutual Life*
**$ 14,000 cv**

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