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Sample: Corporate Executi... • Apr 2023 Lead Advisor: Michael Advisor, CFP® Attorney - Jill Holden (56e) Attorney Sophia Buchanan (24) Dependent Robert Buchanan Betty Buchanan (68) Spouse Carried Buchanan (22)
Dependent CPA - Nick Sampson (56e) **Buchanan Family** (67) Primary Trust Trust - Irrevocable Accountant **Group Term Life Executive VP Physician** \$ 854,000 \$ 50,000 \$ 170,000/yr \$ 480,000/yr **Group Term Life** UL w/ LTC **Annual Bonus** Income Benefit @67 \$ 180,000 \$ 500,000 \$ 240,000/yr \$ 23,049/yr fv **Group Disability** ILIT (Term to 2038) General Hospital Exp Pension @ 65 Rental Income \$ 1,500,000 \$ 6,000/mo \$ 70,000/yr fv \$ 20,000/yr (50%) **Group Disability** LTC Rider (UL) **Rental Income Social Security** \$ 10,000/mo \$ 10,000/mo \$ 20,000/yr (50%) \$ 36,000/yr fv **Social Security** IRA Rollover \$ 36,000/yr fv \$ 776,000 / yr \$ 226,000 / yr \$ 210,000 \$ 2.300.010 \$ 1,154,000 Active 401k Active 403b Fidelity \$ 1,460,000 \$ 800,000 **Robert Buchanan Betty Buchanan** 08/18/1955 03/14/1955 Traditional IRA **Expected Inherita...** \$ 500.010 \$ 3,000,000 fv JOINT **Deferred Annuity Brokerage Account** \$3,720,000 \$ 230,000 \$ 130,000 Teddy's 529 Sophia's 529 Joint Brokerage Joint Brokerage Vacation Home \$ 150,000 \$ 50,000 \$ 2,600,000 \$ 45,000 \$ 730,000 Stock Options (NQ) UL w/ LTC **Apartments** Home Penny Lane* **\$ 850,000** \$ 14,000 cv \$ 623,000 \$ 720,000 Mortgage Cash CITI Bank (\$ 500,000) \$ 50,000 VUL AXA Equitable \$ 60,000 cv

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Insurance

Owned By Another

Deferred Annuity

Liability

Retirement Asset Non-Retirement Asset

Cash Flow

Real Estate