Anderson Capital
Financial Partners

Fact-Check Summary

Evan Census Member • Apr 2021
Lead Advisor: Michael Advisor, CFP®

Evan Levind (49e)
Primary

Spouse ? (49e)
Spouse

VP
ABC*
$ 150,000/yr

Pension @ age _?
Source?*
$ 1/yr

Social Security @ _?
estimate*
$ 1/yr

Annuity Income
Guarantees?*
$ 1/yr

$ 150,000 / yr

$ 525,004

IRA or 401k, 403b
Location? Risk?*
$ 1

401k
MMLISI*
$ 480,000

ROTH IRA
Tax Free Investments*
$ 1

ROTH IRA
Vanguard*
$ 45,000

Frozen Old 401k
Who's managing this?*
$ 1

Permanent Life In...
Carrier?*
$ 1 cv

Permanent Life In...
Carrier?*
$ 1

Long Term Care
Carrier?*
$ 1/mo

Permanent Life In...
Carrier?*
$ 1

Long Term Care
Carrier?*
$ 1/dy

Evan Levind

Spouse ?

JOINT
$ 400,000

Taxable Brokerage
1 Location?*
$ 250,000

Savings
Emergency Fund?*
$ 150,000

Savings
Emergency Fund?*
$ 1

Legacy Fund
For whom?*
$ 1

Taxable Brokerage
Location?*
$ 1

Mortgage to 20__?
Interest Rate?*
($ 1)

Monthly Expenses?
*
($ 1)

LTC for Parents?
Plan to help with this?*
($ 1)

Job Title
Employer?*
$ 1/yr

Annuity Income
Guarantees?*
$ 1/yr

Pension @ age _?
Source*
$ 1/yr

Social Security @ _?
estimate*
$ 1/yr

$ 1 / yr

$ 5

Retirement Annuity
Carrier*
$ 1

IRA or 401k, 403b
Location? Advisor?*
$ 1

Frozen old 401k
Location? Managed?*
$ 1

ROTH IRA
Tax Free Investments*
$ 1

Permanent Life In...
Carrier?*
$ 1 cv

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