

Permanent Life In...

Carrier?\*

\$ 1 cv

Lead Advisor: Michael Advisor, CFP® Evan Levind (49e) Primary Spouse ? (49e)
Spouse VΡ Job Title ABC\* Employer?\* \$ 150,000/yr \$ 1/yr Permanent Life In... Permanent Life In... Carrier?\* Carrier?\* Pension @ age ? **Annuity Income** \$ 1 \$ 1 Source?\* Guarantees?\* \$ 1/yr \$ 1/yr **Long Term Care Long Term Care** Carrier?\* Carrier?\* Social Security @ \_\_? Pension @ age ? estimate\* \$ 1/mo \$ 1/dv Source\* \$ 1/yr \$ 1/yr Social Security @ ? **Annuity Income** estimate\* Guarantees?\* \$ 1/yr \$ 1/yr \$ 150,000 / yr \$1/yr \$5 \$ 525,004 IRA or 401k, 403b **Retirement Annuity** Location? Risk?\* Carrier\* \$ 1 \$ 1 Evan Levind Spouse? IRA or 401k, 403b 401k MMLISI\* Location? Advisor?\* \$ 480,000 \$ 1 **JOINT ROTH IRA** Frozen old 401k \$ 400,000 Tax Free Investments\* Location? Managed?\* \$ 1 \$ 1 **ROTH IRA ROTH IRA Taxable Brokerage** Savings Savings Tax Free Investments\* Vanguard\* Emergency Fund?\* Emergency Fund?\* 1 Location?\* \$ 45,000 \$ 1 \$ 250,000 \$ 150,000 \$ 1 Frozen Old 401k Permanent Life In... **Legacy Fund Taxable Brokerage** Mortgage to 20\_\_\_? Who's managing this?\* Carrier?\* For whom?\* Location?\* Interest Rate?\* \$ 1 \$ 1 cv \$ 1 \$ 1 (\$ 1)

Cash Flow Real Estate Liability Deferred Annuity Stencil Retirement Asset Non-Retirement Asset Insurance Owned By Another ....This page summarizes certain Know Your Client (KYC) data you have provided to us during the fact finding process. Accounts and/or assets marked with a \* have not been offered, sold and/or serviced by [BD\_NAME], [RIA\_NAME], or its

**Monthly Expenses?** 

(\$1)

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LTC for Parents?

Plan to help with this?\*

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