MAR FINANCIAL PLANNING

Sample: Young Family • Aug 2021

Lead Advisor: Matthew A. Ramos, CFP®

Neil Jetson (35) Primary | **Lauren Jetson (35)** Spouse | **Barry Jetson (7)** Dependent

Account Manager
HSH Tech*
$ 95,000/yr

Rental Income
Rental Property*
$ 8,000/yr

Social Security
Estimate @ 67*
$ 30,000/yr

401k
HSH Tech - Fidelity
$ 100,000

ROTH IRA
Vanguard*
$ 3,000

Play Account
E*trade*
$ 25,000

Student Loan
Sallie Mae*
($ 24,400)

Term Life (to 2038)
Genworth*
$ 750,000

Group Term Life
HSH Tech*
$ 50,000

Disability Policy
Do you have?*
$ 1/mo

Term Life (to 2038)
Genworth*
$ 750,000

Group Term Life
Merck*
$ 80,000

Group Disability
Merck*
$ 5,000/mo

$ 103,000 / yr

$ 103,600

Neil Jetson
08/18/1985

Lauren Jetson
08/18/1985

$ 80,000 / yr

$ 40,500

Sales Rep
Merck*
$ 80,000/yr

Social Security
Estimate @ 67*
$ 30,000/yr

ROTH IRA
Fidelity*
$ 3,500

401k
Merck*
$ 42,000

Inheritance
Expected from Mom*
$ 50,000 fv

529 Plan
for Barry*
$ 3,000

Student Loan
Sallie Mae*
($ 5,000)

JOINT
$ 97,000

Checking
TD*
$ 12,000

Savings Account
TD*
$ 5,000

Main Residence
Church Rd*
$ 300,000

Mortgage
BB&T Bank*
($ 220,000)

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