

# Sample Client

One Page Plan  
July 14, 2022



## FINANCIAL PURPOSE

**Make memories with my family and be a burden to no one.**

## GOALS

1. Establish 529 plan for Kids
2. Maximize 401K Savings this year
- ~~Create 10K Travel Account~~

## NEXT STEPS

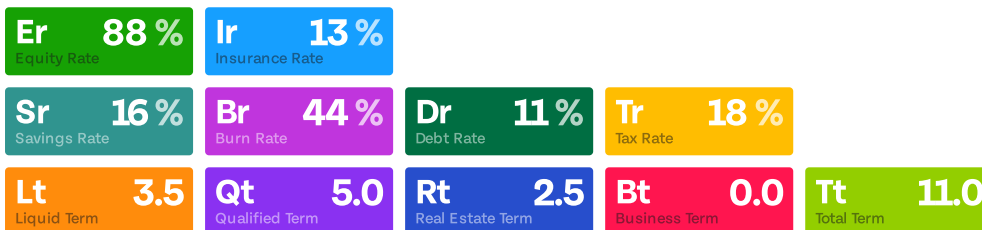
- Review Beneficiaries on all accounts
- ~~Increase 401K Contributions~~
- Update Home & Auto Insurance + Add Umbrella 1M

## CURRENT ANNUAL INCOME

**\$275,000**

## ESTIMATED ANNUAL SPENDING

**\$120,000**



This tool is only intended to illustrate mathematical principles and is not intended to portray investment performance of any particular product or strategy. If you have any questions regarding tax related issues, you should consult a qualified tax professional.

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