Partner 1 & Partner 2
BWM Demo

One Page Plan

September 29, 2023

FINANCIAL PURPOSE

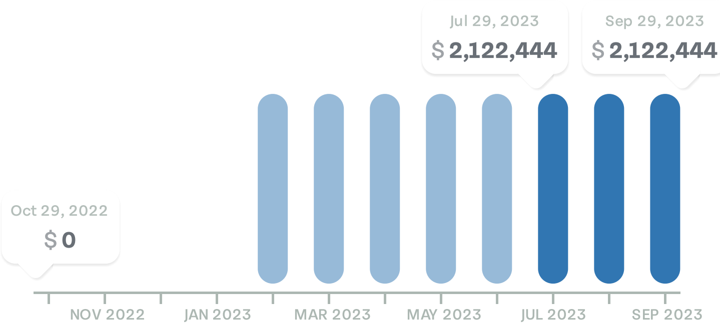
Your purpose is to live richly

GOALS

1. Pay for college

NEXT STEPS

- [ ] Provide BWM with detailed statements



NET WORTH

$2,122,444

$0 (+0%) last 90 days

+$2,122,444 (+100%) since last year

CURRENT ANNUAL INCOME

$320,000

ESTIMATED ANNUAL SPENDING

$162,000

Er 78 % Equity Rate	**Ir** 3 % Insurance Rate		
Sr 7 % Savings Rate	**Br** 13 % Burn Rate	**Dr** 38 % Debt Rate	**Tr** 31 % Tax Rate
Lt 9.5 Liquid Term	**Qt** 3.7 Qualified Term	**Rt** 4.3 Real Estate Term	**Tt** 13.1 Total Term

Elements

Partner 1 & Partner 2
BWM Demo

Personal Financial Statement

September 29, 2023

Net Worth

$2,122,444

Asset & Debt Summaries

After-Tax Investments	$	1,595,464
Pre-Tax Investments	$	537,379
Personal Real Estate	$	700,000
Total Assets	**$**	**2,832,843**

Other Loans	$	-710,399
Total Debts	**$**	**-710,399**

Asset Details

AFTER-TAX INVESTMENTS

Individual Account	Brokerage Account	8 months old	$	1,485,378
Individual Account (Inherited)	Brokerage Account	4 months old	$	51,822
Partner 1 Roth IRA	Roth IRA	8 months old	$	28,365
Partner 2 Current 401k	Roth 401(k)	8 months old	$	29,899

PRE-TAX INVESTMENTS

Partner 1 SEP IRA	Simplified Employee Pension	8 months old	$	10,943
Partner 1 Bene IRA	IRA	8 months old	$	480,020
Partner 2 Old 401k	401(k)	4 months old	$	30,000
Son's 529	Qualified Tuition Plan 529	8 months old	$	16,416

PERSONAL REAL ESTATE

My Primary Residence	Primary Residence	8 months old	$	700,000

Debt Details

OTHER LOANS

My Secured Line of Credit	Secured Line Of Credit	8 months old	$	-710,399