

FINANCIAL PURPOSE

Not worry about retirement and go on more family vacations

GOALS

- 1. Increase income
- 2. Buy a rental property



CURRENT ANNUAL INCOME
\$125,000

ESTIMATED ANNUAL SPENDING
\$72,000

Er Equity Rate 26 %	Ir Insurance Rate 15 %		
Sr Savings Rate 2 %	Br Burn Rate 44 %	Dr Debt Rate 13 %	Tr Tax Rate 18 %
Lt Liquid Term 1.0	Qt Qualified Term 6.9	Rt Real Estate Term -6.8	Tt Total Term 1.2



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.

The rates of return do not represent any actual investment and cannot be guaranteed. Any investment involves potential loss of principal. This illustration does not take taxes, advisory fees, commissions or other expenses into account. The analysis contained in this report is based upon information provided by you, the client. If any of the information is incorrect, you should notify your financial professional. The information provided by you should be reviewed periodically and updated when either the information or your circumstances change. This is not to be considered an official statement of your accounts. In this regard, please refer to the confirmation notices and client statements received from sponsor(s) and custodians. Past performance is not a guarantee of future results. The information displayed in this report should not be used as a primary basis for making investment decisions. Please speak to your Financial Professional prior to making investment decisions.

Stephen & Wheeler Crawford |

Personal Financial Statement

September 29, 2023



Net Worth
\$84,000

Asset & Debt Summaries

Cash	\$	74,000
Pre-Tax Investments	\$	500,000
Personal Real Estate	\$	650,000
Total Assets	\$	1,224,000

Personal Real Estate Loans	\$	-1,140,000
Total Debts	\$	-1,140,000

Asset Details

CASH

BOA	Checking Account	8 months old	\$	14,000
CD	Certificate of Deposit	8 months old	\$	60,000

PRE-TAX INVESTMENTS

Combined	401(k)	8 months old	\$	500,000
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PERSONAL REAL ESTATE

My Primary Residence	Primary Residence	8 months old	\$	650,000
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Debt Details

PERSONAL REAL ESTATE LOANS

My Mortgage	Mortgage	8 months old	\$	-140,000
Vaca Home	Mortgage	7 months old	\$	-1,000,000



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