

All the Info You Need



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Trusted Advisors Name Company Phone Number

Attorney

CPA/Tax Advisor

Financial Advisor

Pastor/Priest

Funeral Home

Family to call:

Friends to call:

Neighbors to call:

Favorite Bible Passages, Poems, or Sayings You would like communicated:

I'd just as soon these people were not there:

LAST NAME Holdings

DESCRIPTION	WHOSE	IDENTIFYING #	VALUE AS OF 7/23/2020	CONTACT	PHONE NUMBER	NOTES
Whole Life/Term Insurance	HERS	1701234	\$ 159,138.50	Customer Service Life	877-123-0000	
Whole Life/Term Insurance	HIS	1691234	\$ 211,000.00	Customer Service Life	877-123-0000	GLWB \$3,161.84 off \$70,263.18 9/10/2023
Annuity	HIS	E1881234	\$ 79,764.64	CO Annuity	800-123-0000	GLWB \$1886.89 of \$41,930.28 9/9/23 10 yr
Annuity	HERS	E1881235	\$ 30,322.13	CO Annuity	800-123-0000	
BANK/CREDIT UNION						
Mortgage or Home Savings	Joint	999123	\$ 18,900.00	BANK/CU	800-999-8888	no mortgage, pd biweekly from acct
CDS			\$ 62,532.17			1-4/26/2020; 2-5/21/2021
Paul's Visa	Joint	BANK	\$ (2,517.93)			due 21st of month
Paul's Visa		CitiBank	\$ (45.00)			
Emergency Savings			\$ 4,925.31			
CD			\$ 2,044.01			7/8/2021
Discover Card			\$ (500.00)			
INVESTMENTS						
E*Trade	Joint	492000	\$ 40,652.88	Financial Advisor	717-444-3333	Sally Smartone
HIS 401K/IRA			\$ 250,301.24	Fidelity	800-123-7777	
Company Stock	# shares	425	\$ 58,506.84	Company	717-555-6666	
HER 401K/IRA	2015	600	\$ 6,690.59	Company	717-555-6666	
Performance Stock	2000	36	\$ -	Company	717-555-6666	
Home Value			\$ 260,000.00			
TOTAL HOLDINGS			\$ 1,201,299.38			