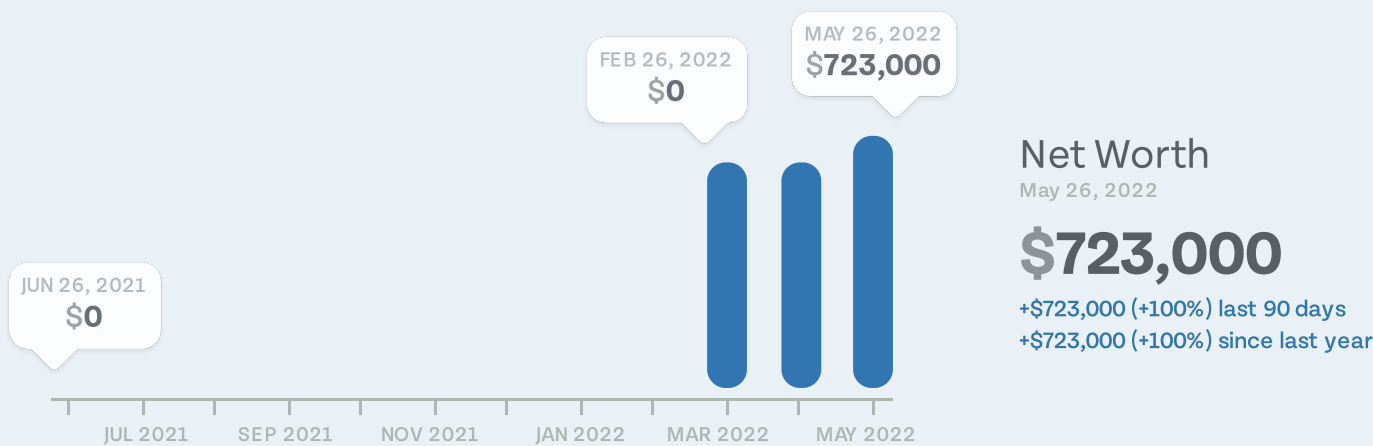


Sample Client

Progress Report

May 26, 2022



Asset & Debt Summaries

Cash	\$	65,000
After-Tax Investments	\$	110,000
Pre-Tax Investments	\$	265,000
Personal Real Estate	\$	775,000
Total Assets	\$	1,215,000

Personal Real Estate Loans	\$	-492,000
Total Debts	\$	-492,000

Asset Details

CASH

Chase	Checking Account	2 minutes old	\$	65,000
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AFTER-TAX INVESTMENTS

Fidelity	Brokerage Account	1 minute old	\$	110,000
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PRE-TAX INVESTMENTS

Schwab	IRA	48 seconds old	\$	265,000
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PERSONAL REAL ESTATE

Primary	Primary Residence	23 seconds old	\$	775,000
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Debt Details

PERSONAL REAL ESTATE LOANS

Home	Mortgage	36 seconds old	\$	-492,000
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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.