

Joan & Stephen Sample

One Page Plan
January 2, 2024

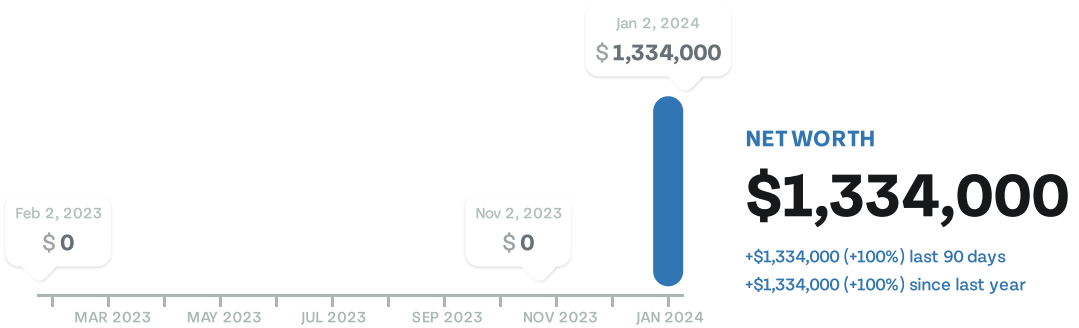


FINANCIAL PURPOSE

Does not want to worry about retirement. Seeks more family vacations.

GOALS

- 1. Find a new job this year
- 2. Purchase a rental property
- 3. Leave a legacy of \$100,000
- 4. Retire at age 70

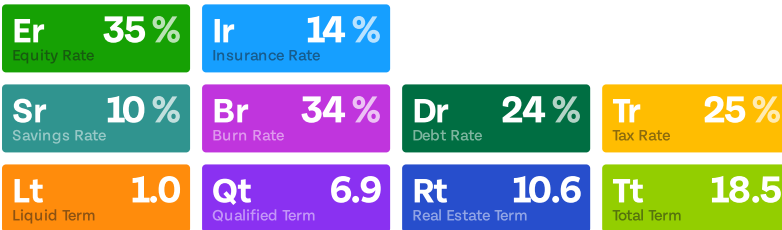


CURRENT ANNUAL INCOME

\$125,000

ESTIMATED ANNUAL SPENDING

\$72,000



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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