My true purpose for money is: _____

Home
$400,000
Mortgage: $223,000

$673 + Tax + Insurance
3.523% (30 yr)

Annuities:

Joint/Personal:
$255,000   60/40

($6,000)   ($6,000)

Roth: 75/25
$24,000

Roth: 75/25
$18,000

Work Plan:

Work Plan:

$4,000
($1,600 match)

$8,000
($2,000 match)

Special Goal Funds:
Next Car $15,000

$300/mo

Emergency Funds:
$2,000 Checking $32,000 Savings
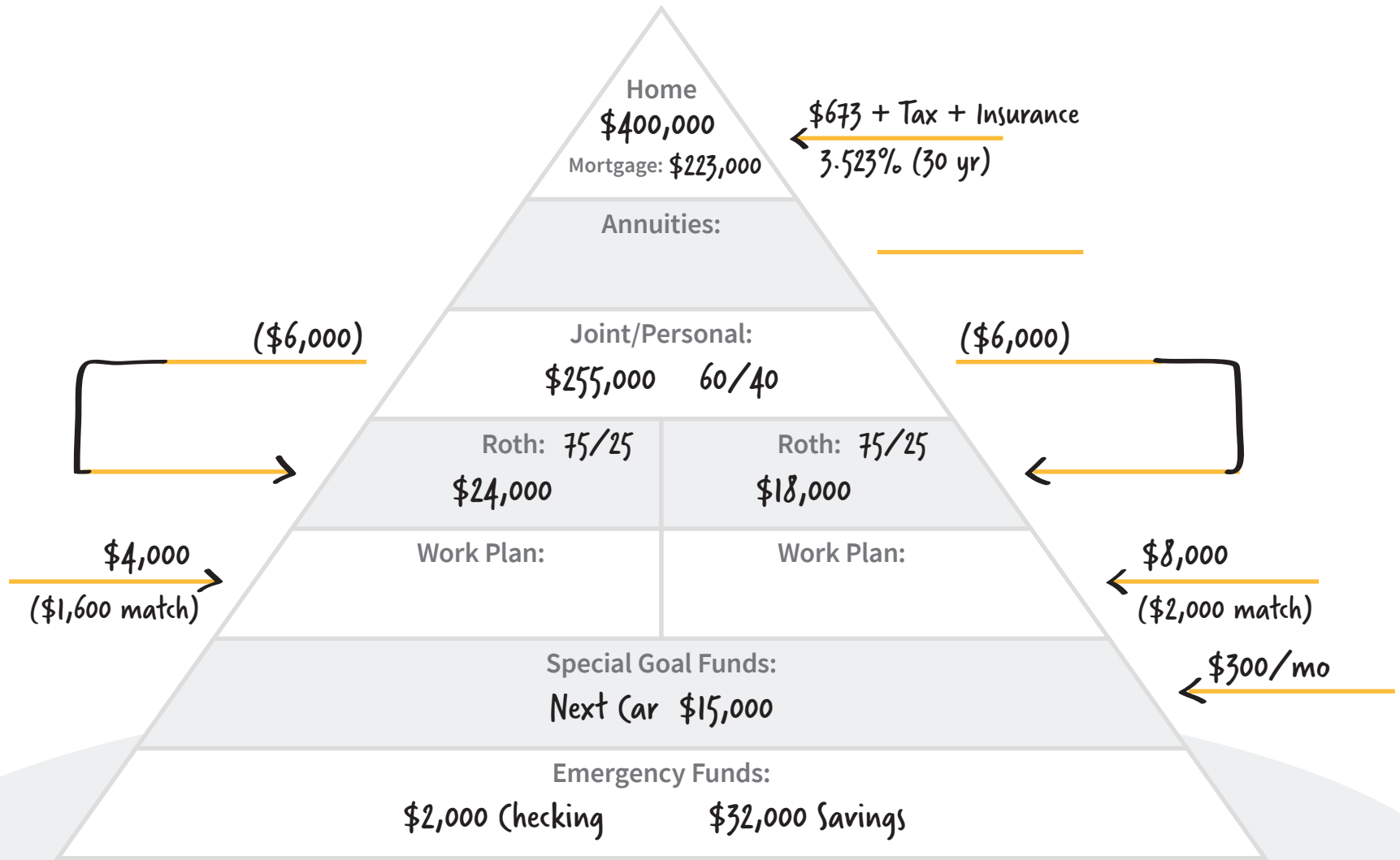
Life Insurance:
$1,000,000 Term on Mike
20 yr level (15 yrs left)
$750,000 Term on Judy
20 yr level (15 yrs left)

Social Security:
Full Retirement Age
FRA 67 for both
Mike $2,750
Judy $2,240

Home/Auto Ins: Yes
Umbrella Ins: −$1,000,000
Disability Ins: Short Term No
Long Term 90 Day
to age 67 (60%)

Estate Plan: Yes
Last Update: 2021
Health Ins: Yes BCBS