

Property Summary

Prepared for Paul and Lynn Price

The Property Summary report lists your real estate and personal property.

PROPERTY, REAL ESTATE

Primary Residence

Value: \$1,000,000

Address 1:

City, State, Zip: ,

Owner: Paul and Lynn (Joint/ROS)

Address 2:

Mortgages

Mortgage Balance: 200,000 as of 11/5/2014

Institution:

Shore House

Value: \$400,000

Address 1:

City, State, Zip: ,

Owner: Paul and Lynn (Joint/ROS)

Address 2:

Mortgages

Mortgage Balance: 100,000 as of 11/5/2014

Institution:

PROPERTY, PERSONAL

Lynn's Car

Value: \$30,000

Owner: Lynn Price

Paul's Car

Value: \$50,000

Owner: Paul Price

This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/ representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.
