

Household Snapshot

Jane Marie Sampleton

April 25, 2026

TOTAL ASSETS

\$2,198,500

TOTAL LIABILITIES

\$429,540

ESTIMATED NET WORTH

\$1,768,960

YOUR INFORMATION

| | |
|------------------------|----------------------|
| Name | Jane Marie Sampleton |
| Date of Birth | 05/14/1978 |
| Sex | Female |
| Marital Status | Married |
| Social Security Number | 123-45-6789 |
| City of Birth | Boston |
| State of Birth | MA |

CONTACT

| | |
|----------------|----------------------------|
| Personal Email | jane.sampleton@example.com |
| Work Email | jsampleton@acmecorp.com |
| Mobile Phone | (555) 123-4567 |

HOME ADDRESS

| | |
|-----------|-----------------------------------|
| Address | 42 Oak Street, Elmsford, NY 10523 |
| Homeowner | Yes |

DRIVER'S LICENSE — YOU

| | |
|-----------------|----------------|
| Number | D123-4567-8901 |
| Issuing State | NY |
| Issue Date | 03/14/2022 |
| Expiration Date | 03/14/2030 |

SPOUSE / PARTNER

| | |
|----------------|----------------|
| Name | John Sampleton |
| Date of Birth | 08/22/1976 |
| Sex | Male |
| City of Birth | Albany |
| State of Birth | NY |

Email john.sampleton@example.com
Mobile Phone (555) 987-6543

DRIVER'S LICENSE — SPOUSE

Number D987-6543-2109
Issuing State NY
Issue Date 06/22/2021
Expiration Date 06/22/2029

CHILDREN & DEPENDENTS

| Name | Date of Birth | SSN |
|-----------------------|---------------|-----|
| Emma Lynn Sampleton | 03/11/2010 | |
| Lucas James Sampleton | 07/08/2013 | |

TRUSTED CONTACT

Name Margaret Sampleton
Email margaret.s@example.com
Phone (555) 222-3344
Address 88 Maple Lane, Bronxville, NY 10708

ESTATE DOCUMENTS

Will Yes
Trust No
Power of Attorney Yes
Healthcare Proxy / Advance Directive Yes

OTHER BENEFICIARIES

| Name | Relationship | Notes |
|--------------------|---------------------|----------------------|
| Margaret Sampleton | Parent | 25% of Roth IRA |
| American Red Cross | Charity / Nonprofit | \$25,000 from estate |

YOUR EMPLOYMENT

Employer Acme Corporation
Occupation Marketing Director
Employer Address 500 Corporate Drive, White Plains, NY 10601
Annual Income \$145,000
Self-Employed No

SPOUSE'S EMPLOYMENT

Employer Beta Industries
Occupation Senior Mechanical Engineer

| | |
|-------------------------|---|
| Employer Address | 120 Industrial Way, Tarrytown, NY 10591 |
| Annual Income | \$125,000 |
| Self-Employed | No |

HOUSEHOLD INCOME (ANNUAL, APPROXIMATE)

| | |
|--------------------------------|-----------|
| Total Employment Income | \$270,000 |
| Rental Income | \$28,800 |

EXPECTED CHANGES (NEXT 1-3 YEARS)

We are considering early retirement in roughly 8-10 years. Our oldest child will be starting college in fall of 2027 and we expect to draw on the 529 plan to fund her tuition. We may also receive an inheritance from a grandparent within the next 2-3 years.

BANK ACCOUNTS

| Institution | Type | Owner | Balance |
|--------------|--------------|---------|------------------|
| Chase Bank | Checking | Joint | \$28,500 |
| Ally Bank | Savings | Joint | \$85,000 |
| Capital One | Money Market | Primary | \$22,000 |
| Total | | | \$135,500 |

INVESTMENT ACCOUNTS

| Institution | Type | Owner | Value |
|--------------|----------------------|---------|------------------|
| Fidelity | Individual Brokerage | Primary | \$225,000 |
| Schwab | Joint Brokerage | Joint | \$78,000 |
| Total | | | \$303,000 |

RETIREMENT ACCOUNTS

| Institution | Type | Owner | Balance |
|--------------|-----------------|---------|------------------|
| Fidelity | 401(k) | Primary | \$385,000 |
| Schwab | Traditional IRA | Spouse | \$142,000 |
| Schwab | Roth IRA | Primary | \$58,000 |
| Vanguard | 401(k) | Spouse | \$215,000 |
| Total | | | \$800,000 |

REAL ESTATE

| Property Type | Owner | Estimated Value | Mortgage Balance |
|-------------------|-------|------------------|------------------|
| Primary Residence | Joint | \$620,000 | \$285,000 |
| Rental Property | Joint | \$340,000 | \$125,000 |
| Total | | \$960,000 | \$410,000 |

MORTGAGES

| Lender | Owner | Balance | Monthly Pmt | Rate | Term |
|---------------|-------|------------------|----------------|-------|----------|
| Wells Fargo | Joint | \$285,000 | \$2,450 | 3.25% | 22 years |
| Quicken Loans | Joint | \$125,000 | \$1,180 | 4.50% | 18 years |
| Total | | \$410,000 | \$3,630 | | |

OTHER LOANS

| Loan Type | Balance | Monthly Pmt | Rate |
|-------------------------|-----------------|--------------|------|
| Auto - 2023 Honda Pilot | \$14,500 | \$425 | 5.9% |
| Total | \$14,500 | \$425 | |

CREDIT CARDS

| Card Issuer | Balance | Rate |
|----------------|----------------|--------|
| Amex Platinum | \$3,200 | 21.99% |
| Chase Sapphire | \$1,840 | 23.49% |
| Total | \$5,040 | |

LIFE INSURANCE

| Insured | Carrier | Type | Death Benefit | Premium | Beneficiary |
|-----------------------|---------------------|------------|--------------------|------------|-----------------------------|
| You | MassMutual | Term | \$1,000,000 | \$850/yr | Spouse |
| Spouse | Northwestern Mutual | Whole Life | \$500,000 | \$3,200/yr | Spouse and children equally |
| Total Coverage | | | \$1,500,000 | | |

OTHER INSURANCE COVERAGE

| | |
|----------------|--|
| Disability | Yes — Group policy via Acme Corp - 60% of base salary, 90-day elimination period |
| Long-Term Care | No |
| Health | Employer / Group |
| Umbrella | Yes — \$1,000,000 |