

BULLOGIC WEALTH MANAGEMENT  
**FINANCIAL PLAN SUMMARY**

PREPARED FOR:

**George and Louise Jefferson**

DECEMBER FINANCIAL SUMMARY

**CONTENTS:**

Net Worth Summary



**BULLOGIC**  
Wealth Management

# Net Worth Scorecard

Your Net Worth Rate

**20.2**

Peer Benchmark

**13.5**

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**Net Worth Rate  
Explanation**

Net Worth Rate is calculated by dividing net worth by annual personal spending. This value estimates the number of years a person could live on their current assets if they did not grow. This includes cash, investments, private business equity, and real estate equity.

## Notes and Action Items

- Your net worth has grown 13% over last year, congratulations that is a great accomplishment.
- You have excess cash sitting in your accounts, it is a good idea to get that money invested so it is working for you.
- To increase your net worth, we have put together an aggressive debt repayment strategy that will lower your liabilities.
- The majority of your assets are in Always Taxable accounts, we should focus your savings into Never Taxable and Maybe Taxable accounts to help your future tax liability.

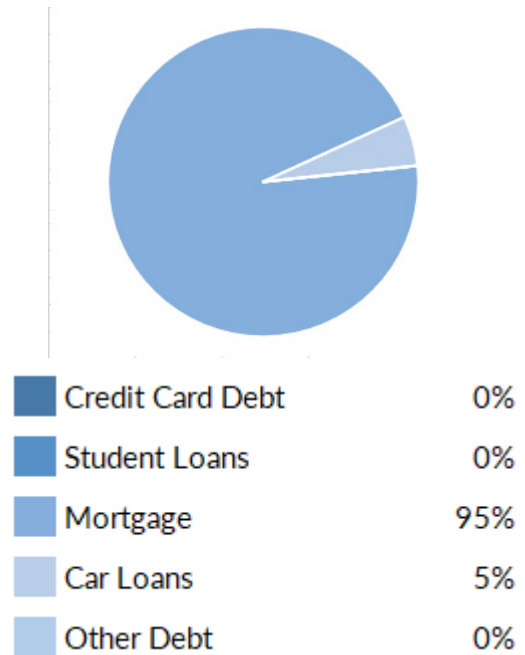
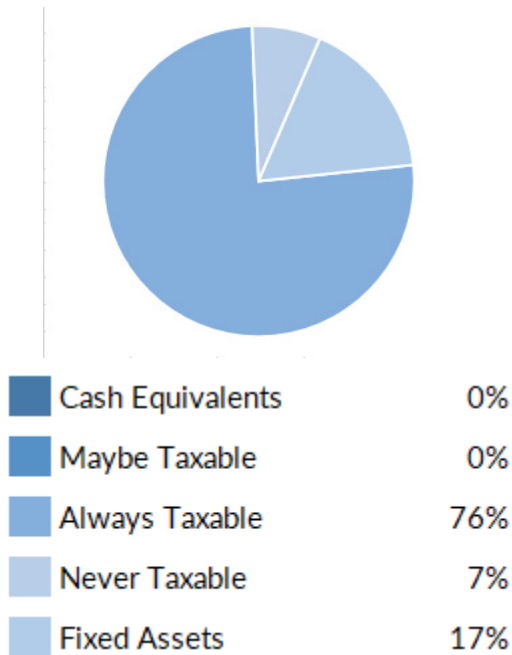
# **Appendix**

*Net Worth Summary*

# Net Worth Summary

Assets	
Cash Equivalents	-
Maybe Taxable	-
Always Taxable	2,324,415
Never Taxable	218,385
+ Fixed Assets	515,813
<b>= Total Assets</b>	<b>\$3,058,613</b>

Liabilities	
Credit Card Debt	-
Student Loans	-
Mortgage	189,341
Car Loans	10,360
+ Other Debt	-
<b>= Total Liabilities</b>	<b>\$199,701</b>



**Net Worth Summary: Total Assets - Total Liabilities**  
**3,058,613 - 199,701 = \$2,858,912**

# Net Worth Rate

Net Worth Rate: Net Worth / Annual Personal Spending  
 $2,858,912 / 141,567 = 20.2$

