

BULLOGIC WEALTH MANAGEMENT
FINANCIAL PLAN SUMMARY

PREPARED FOR:

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DECEMBER FINANCIAL SUMMARY

CONTENTS:

Net Worth Summary



BULLOGIC
Wealth Management

Net Worth Scorecard

Your Net Worth Rate

20.2

Peer Benchmark

13.5

**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.

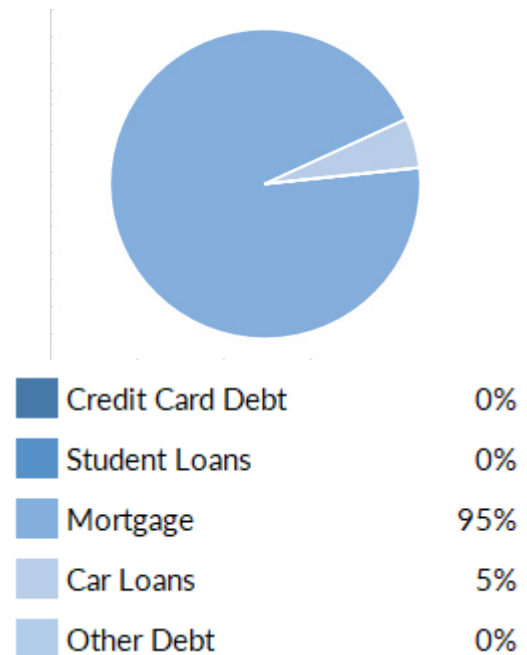
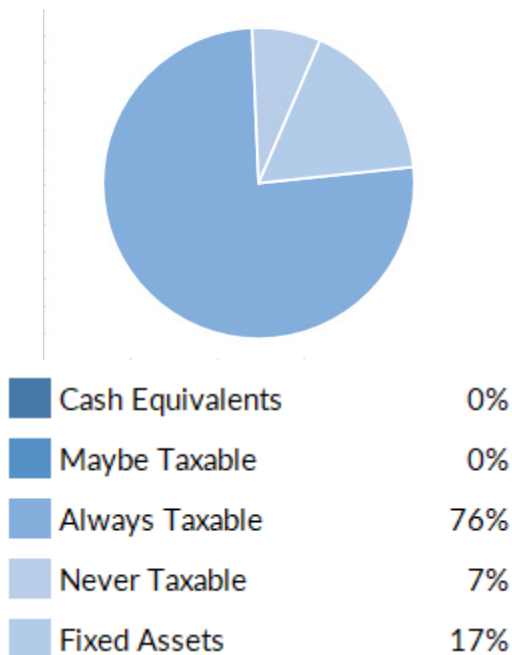
Appendix

Net Worth Summary

Net Worth Summary

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

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



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
 $2,858,912 / 141,567 = 20.2$

