

BULLOGIC WEALTH MANAGEMENT
FINANCIAL PLAN SUMMARY

PREPARED FOR:

Chandler Bing and Monica Geller

MARCH FINANCIAL SUMMARY

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Savings Summary



BULLOGIC
Wealth Management

Savings Rate Scorecard

Your Savings Rate

22.1

Peer Benchmark

28.7

**Savings Rate
Explanation**

Savings Rate is calculated by dividing total annual savings by total personal income. Savings includes deposits made to retirement accounts, other savings accounts, education accounts, and extra payments towards debt. Savings Rate indicates how much your income is being put away for future expenses, emergencies, and retirement.

Notes and Action Items

- ❑ You have enough money in your savings account to cover your emergency fund of 3 months.
- ❑ Your savings rate is good but we can use a brokerage account to increase the amount you are saving.
- ❑ Your savings is currently earning a low interest rate, we recommend putting your emergency fund into a high-yield savings account, to earn an extra \$900 a year.

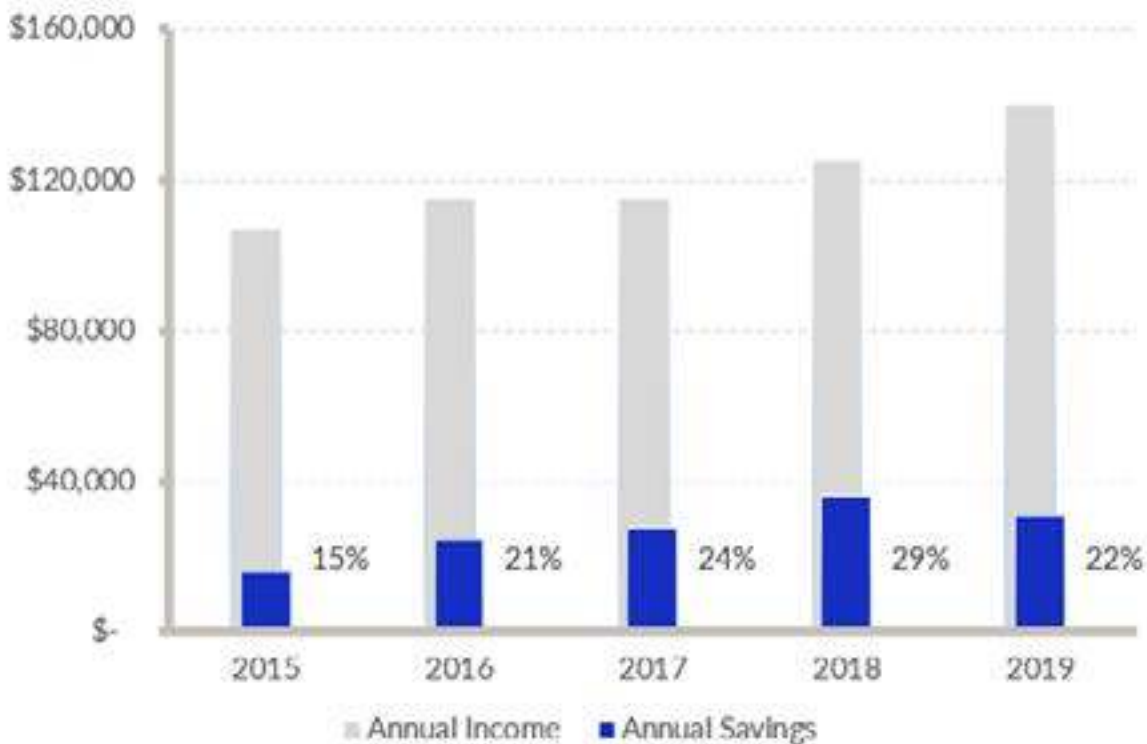
Appendix

Savings Summary
Monthly Savings
Savings by Account

Savings Rate Details

Savings Details		Income Utilization	
Retirement Accounts	21,600	Income	140,000
Other Savings	2,500	Living Expenses	50,000
Education Accounts	6,800	Liabilities	11,532
Extra Debt Payments	-	Insurance	6,232
+		- Taxes	32,793
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= Total Annual Savings	\$30,900	= Potential Savings	\$39,443

Savings Rate: Total Annual Savings / Total Annual Income
 $30,900 / 140,000 = 22.1\%$



Monthly Savings Summary

	Retirement	Other Savings	Education	Debt Payments
January	1,800	208	-	-
February	1,800	208	-	-
March	1,800	208	-	-
April	1,800	208	-	-
May	1,800	208	850	-
June	1,800	208	850	-
July	1,800	208	850	-
August	1,800	208	850	-
September	1,800	208	850	-
October	1,800	208	850	-
November	1,800	208	850	-
December	1,800	208	850	-
Annual Totals	\$21,600	\$2,500	\$6,800	-

Savings by Account

Account Name	Balance	Deposits	Automatic
Untaxed: Chandler 401k	150,805	15,000	Yes
Untaxed: Monica 401k	23,500	6,600	Yes
Taxed: HSA	12,000	2,500	Yes
529: Erica	25,000	6,800	Yes