

Asset-Map[®]

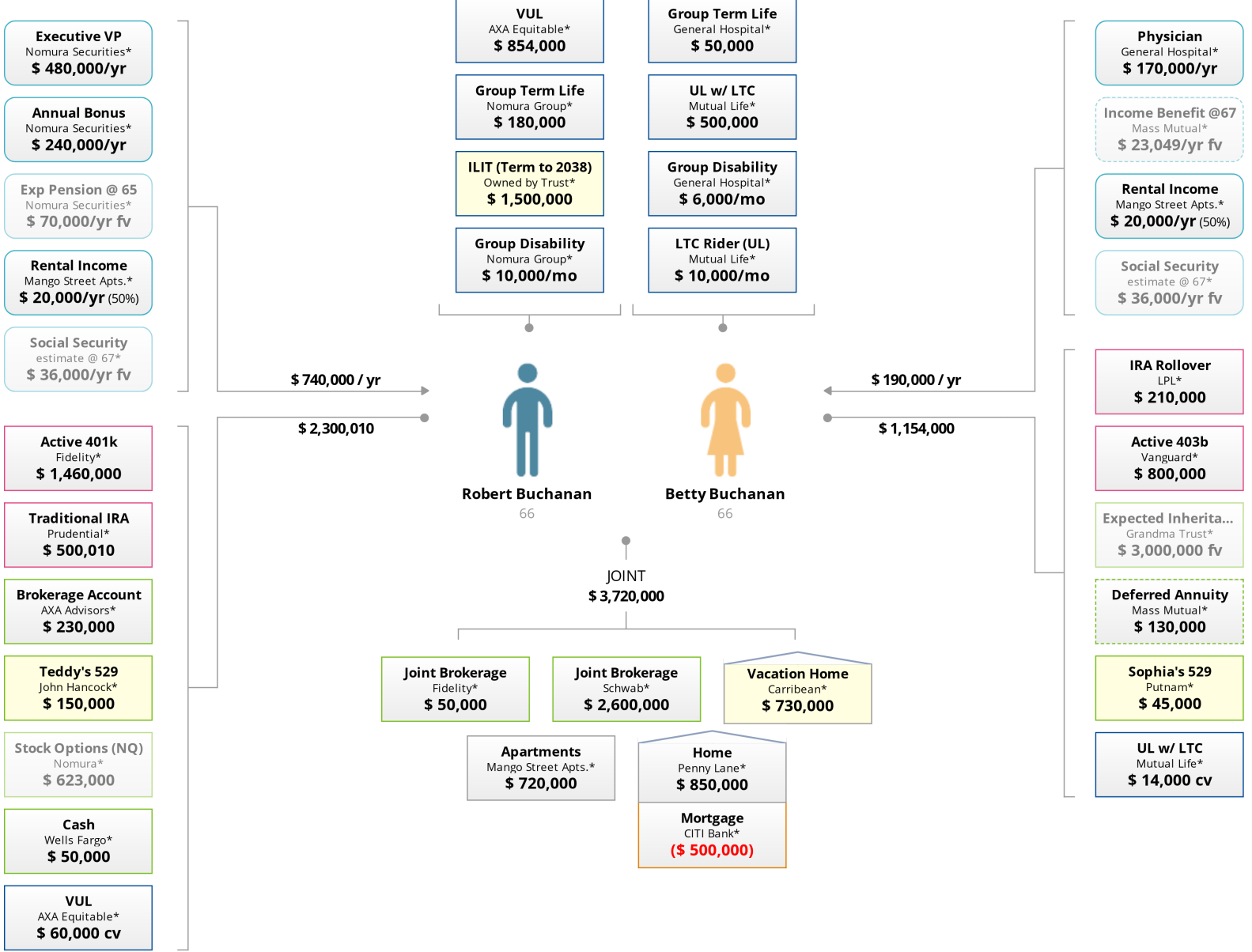
Sample: Corporate Executive

December 2021

Lead Advisor

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Financial planner
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- Robert Buchanan (66)**
Primary
- Betty Buchanan (66)**
Spouse
- Sophia Buchanan (22)**
Dependent
- Teddy Buchanan (20)**
Dependent
- CPA - Nick Sampson (55e)**
Accountant
- Attorney - Jill Holden (55e)**
Attorney
- Buchanan Family Trust - Irrevocable**



Disclosure Statement

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