

Asset-Map[®]

Sample: Small Business Owner

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Lead Advisor

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John Smith (57e)
Primary

Jane Smith (50e)
Spouse

Kyle (Business Partner) (47e)
Business Partner

Jenkins International (2e)
Other

Founder & CEO
Jenkins International
\$ 250,000/yr

Rental Income
Rental Property*
\$ 14,400/yr (50%)

Profit Distribution
Jenkins International
\$ 100,000/yr

Social Security
Estimate at age 67*
\$ 36,000/yr fv

Safe Harbor 401(k)
Jenkins International
\$ 425,000

Cash Balance Plan
Jenkins International
\$ 600,000

NQDC
Jenkins International*
\$ 1

Business Interest
Jenkins International
\$ 2,000,000

Business Realstate
Value*
\$ 1,500,000

Term Life (2038)
Northwestern Mutual
\$ 1,000,000

Buy/Sell Policy
On Kyle
\$ 2,000,000

Long Term Dis.
Northwestern Mutual*
\$ 150,000/yr

Term Life (2038)
Northwestern Mutual*
\$ 500,000

Group Life
Smile Dental *
\$ 160,000

Group Disability
Smile Dental *
\$ 48,000/yr

Dental Hygienist
Smile Dental *
\$ 80,000/yr

Rental Income
Rental Property*
\$ 14,400/yr (50%)

Social Security
Estimate at age 67*
\$ 28,000/yr fv

IRA
Fidelity
\$ 15,000

401(k)
Smile Dental
\$ 79,000

\$ 364,400 / yr

\$ 4,525,000

\$ 94,400 / yr

\$ 94,000

John Smith
57 (e)

Jane Smith
50 (e)

JOINT
\$ 673,000

Savings Account
PNC
\$ 40,000

Checking Account
PNC
\$ 13,000

Rental Property
1504 Burberry Lane
\$ 300,000

Mortgage
Wells Fargo, 3.75%
(\$ 95,000)

Home
Austin, TX
\$ 675,000

Mortgage - 30 yr
Wells Fargo, 4.75%
(\$ 260,000)

Disclosure Statement

Please visit <https://www.aaronbraskcapital.com/disclosures> for disclosures regarding my firm - Aaron Brask Capital LLC.

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