



Don (49 yrs) & Lauren (43 yrs)

Provide for the future of children

Ensure fin security for family non

Values

Send children to 1st rate college

Spend <time working & more w/ children

Goals

Leave legacy for kids

Sell Don's biz w/in 10 yrs to realize equity

Assist in LTC + financial needs of Don's Mom

RR by 60 to travel + pursue charitable activities

Relationships

Don's Mom Sylvia, 77 yrs

Pets = Max (black Lab) & Scarlet (Cat)

Both Lauren's Parents Died in last 2 yrs

Kids: Michael, 14 yrs Don's son prev. marriage Jessica & Jordan both 8 yrs

Assets

Don owns Structural Engineering Consulting Firm 9EE's + \$700K Annual Net Inc.

Lauren: Works as Administrator at Reg Med ctr Annual salary \$225K

Home (Primary residence) Approx 1.3mil w/ 400K note

401K Acct value \$450K

Lake House (weekend get away) value: Approx \$650K

Brokerage Accts: Approx \$500K value

Lauren will get parents estate in next 6 mos, Approx value: 1.5 mil

Process

Prefer hands-off approach in order to focus on work & family

Want a comprehensive plan to see progress towards goals

Advisors

CPA: helps w/ tax planning & Don's Biz taxes

Attorney: managing probate of Lauren's parents estate

Life Ins Agent sold Whole Life Policy on Don

Broker @ firm where brokerage acct held

Bus Equity Approx. \$2 mil

Keough acct value \$1.8 mil

\$500K whole life policy on Don (owned by Lauren)

Kids activities (school & sports)

Relax w/ family @ lake house

Charitable Org. (both Don & Lauren sit on Non-Profit Bds)

Interests