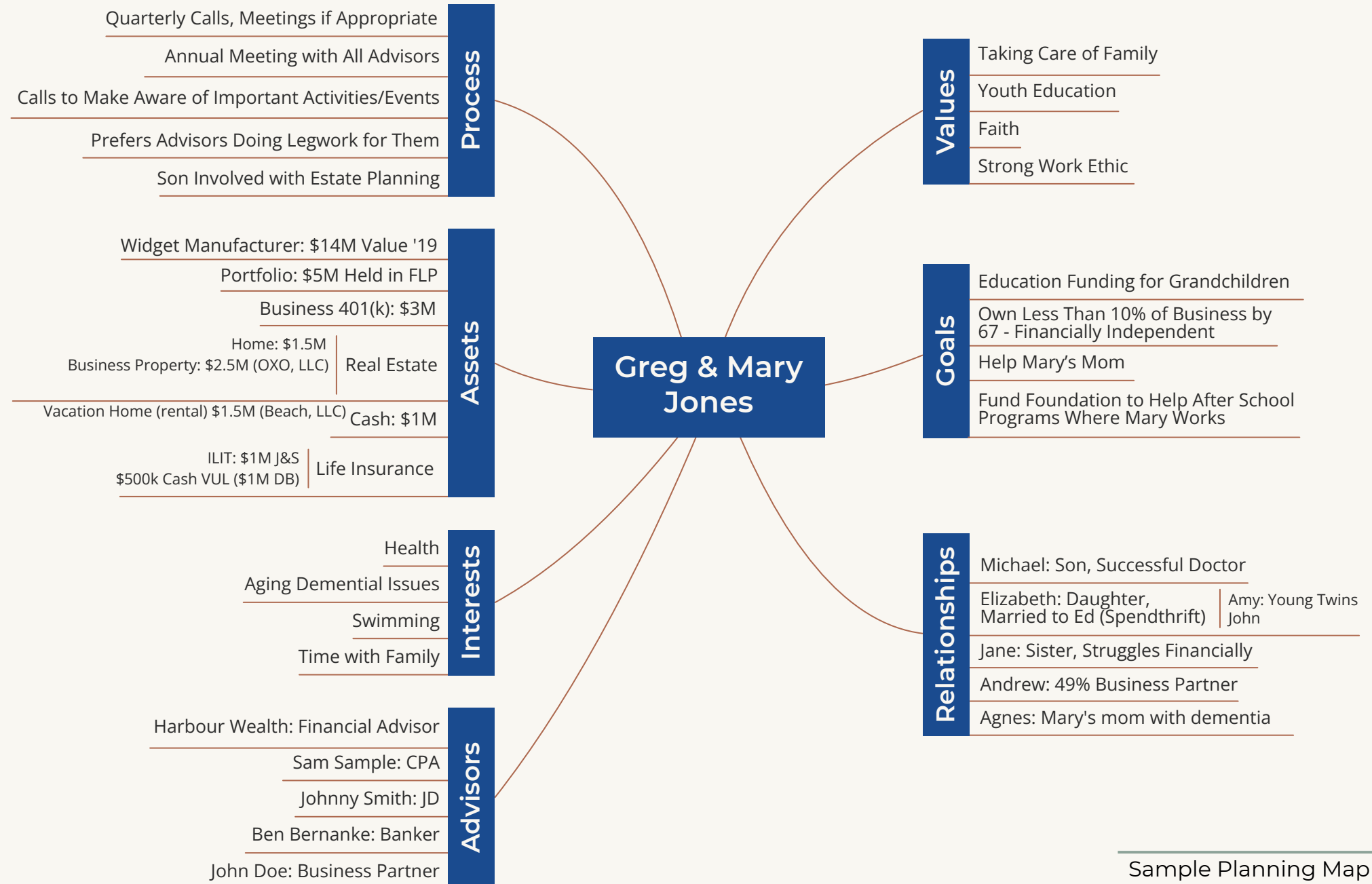


# SAMPLE PLANNING MAP: GREG & MARY JONES



# SAMPLE PLANNING MAP: GREG & MARY JONES

## 1. Values

- 1.1. Taking Care of Family
- 1.2. Youth education important
- 1.3. Faith
- 1.4. Strong Work Ethic

## 2. Goals

- 2.1. Edu Funding for Grandchildren
- 2.2. Own Less Than 10% of Business by 67-  
financially independent
- 2.3. Help Mary's Mom
- 2.4. Fund Foundation to help after school  
programs where Mary works

## 3. Relationships

- 3.1. Michael - Son, successful doctor
- 3.2. Elizabeth-  
Daughter -married to Ed- Spendthrift
  - 3.2.1. Amy-young twins
  - 3.2.2. John
- 3.3. Jane - Sister - Struggles Financially
- 3.4. Andrew--49% Business Partner
- 3.5. Agnes--Mary's mom with dementia

## 4. Advisors

- 4.1. Harbour Wealth - Financial Advisor
- 4.2. Sam Sample - CPA
- 4.3. Johnny Smith - JD
- 4.4. Ben Bernanke - Banker
- 4.5. John Doe - Business Partner

# SAMPLE PLANNING MAP: GREG & MARY JONES

## 5. Interests

- 5.1. Health
- 5.2. Aging Dementia Issues
- 5.3. Swimming
- 5.4. Time with Family

## 6. Assets

- 6.1. Widget Manufacturer-\$14mm value '19
- 6.2. Portfolio- \$5mm--Held in FLP
- 6.3. Business 401(k)-\$3mm
- 6.4. Real Estate
  - 6.4.1. Home-\$1.5mm
  - 6.4.2. Business Property-\$2.5mm (OXO, LLC)
  - 6.4.3. Vacation Home (rental) \$1.5mm  
(Beach, LLC)

6.5. Cash--\$1mm

6.6. Life insurance

6.6.1. ILIT: \$1mm J&S

6.6.2. \$500k cash VUL (\$1mm DB)

## 7. Process

- 7.1. Quarterly Calls, Meetings if Appropriate
- 7.2. Annual Meeting with All Advisors
- 7.3. Calls to Make Aware of Important Activities/  
Events
- 7.4. Prefers advisors doing legwork for them
- 7.5. Son Involved with Estate Planning

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