
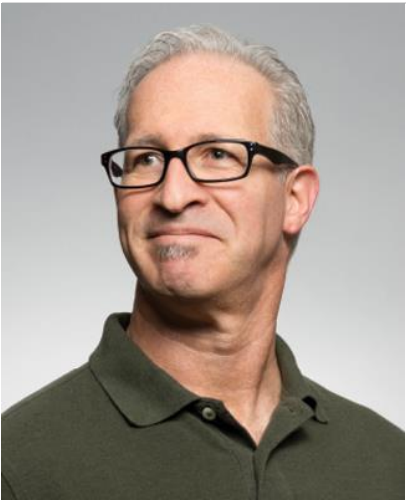


Client / Age	Assets / Pensions / 401(k) / Stock Options	Family	Goals	Referral Prospects	Lifestyle Interests & Financial Concerns
 <p>Charles (55) & Jean (52) Walters</p>	<p>\$2,000,000 / \$900,000 / \$200,000 / \$3,500,000</p>	<p>Son Tom (15) Father Bill (80)</p>	<p>Asset Accumulation College Planning</p>	<p>Sue James (Sister) Bob Walters (Brother)</p>	<p>Tennis (Tennis Event) Retirement Planning Budget Planning for College Students</p>
 <p>Bill Bean (63)</p>	<p>\$500,000 / \$1,200,000 / \$600,000 / \$0</p>	<p>Nephews: Tom (16) Rick (18)</p>	<p>College for Nephews Retirement in 5 years</p>	<p>Tom Bean (Brother)</p>	<p>BMW Showroom Seminar (Sports Cars) Budget Planning for College Students</p>