

TCC — Net Worth Overview

James Whitman

Age 54 · SSN **4421

Sarah Whitman

Age 52 · SSN **8830

JAMES WHITMAN RETIREMENT

Schwab Roth IRA

**1102

\$184,000

Schwab Traditional IRA

**2031

\$412,000

Fidelity 401(k)

**4488

\$612,000

SARAH WHITMAN RETIREMENT

Schwab Roth IRA

**5510

\$156,000

Vanguard 401(k)

**7723

\$488,000

NON-RETIREMENT (JOINT)

Schwab Brokerage

**9091

\$215,000

cash \$12,000

Pinnacle Checking

**0044

\$22,000

Pinnacle Private Reserve

**0055

\$78,000

TRUST — PRIMARY RESIDENCE

1428 Elm Avenue, Atlanta, GA 30309

\$985,000

Zillow estimate

LIABILITIES (SEPARATE)

Mortgage

5.88% APR

\$340,000

Auto Loan

6.49% APR

\$18,000

Total liabilities

\$358,000

JAMES RETIREMENT

\$1,208,000

SARAH RETIREMENT

\$644,000

NON-RETIREMENT

\$315,000

GRAND TOTAL NET WORTH

\$3,152,000