

TCC — Net Worth Overview

Marcus Calhoun

Age 46 · SSN ••3192

Elena Reyes

Age 44 · SSN ••6745

MARCUS CALHOUN RETIREMENT

Schwab Roth IRA

••7711

\$98,000

Fidelity 401(k)

••4422

\$385,000

ELENA REYES RETIREMENT

Vanguard 403(b)

••8855

\$267,000

Schwab SEP-IRA

••0099

\$112,000

TRUST — PRIMARY RESIDENCE

742 Magnolia Court, Atlanta, GA 30308

\$735,000

Zillow estimate

LIABILITIES (SEPARATE)

None

MARCUS RETIREMENT

\$483,000

ELENA RETIREMENT

\$379,000

NON-RETIREMENT

\$0

GRAND TOTAL NET WORTH

\$1,597,000