



- Plastic Surgeon University Hospital*
\$1,000,000/yr
- Profit Sharing University Hospital*
\$55,000/yr
- Social Security at age 67*
\$36,000/yr

- Current 401(k) Fidelity*
\$1,280,000
- Cash Balance Plan Practice*
\$280,000
- Rollover IRA Schwab*
\$430,500
- Trading account eTrade*
\$75,000

Shared LTC Benefit
Omaha*
\$180,000/yr

Term Life to 2034 Ohio National*
\$2,500,000

Group Life Paid by employer*
\$180,000

Buy Sell Paid by Practice*
\$1,000,000

Over Funded Index L... Allianz*
\$500,000

Whole Life Northwestern*
\$1,000,000

Disability Insurance through work*
\$9,000/mo

Disability Guardian*
\$2,000/mo

Disability MassMutual*
\$10,000/mo

Practice DI MGIS*
\$15,000/mo

Retirement DI MGIS*
\$4,000/mo

Disability Standard*
\$3,000/mo

VP of Marketing Congrand Inc.*
\$180,000/yr

Rental income Rental Property*
\$35,000/yr

Social Security at age 67*
\$36,000/yr

Current 401(k) Need statements?***\$580,000**

Rollover IRA Schwab
\$170,500

College Funding Jenny's 529 Plan*
\$180,000

Rental Property Sarasota*
\$550,000

Mortgage to 2024 Wells Fargo*
(\$75,000)

Whole Life Northwestern*
\$537,000 cv

\$1,055,000/yr

\$1,785,500

\$215,000/yr

\$1,762,500



Jacob Weller



Samantha Weller