Investments | Clients, Robert

Value	Account Name	Account Title	Primary Beneficiary	Primary Percentage	Beneficiary Receives	Contingent Beneficiary	Contingent Beneficiary %	Contingent Beneficiary Receives
$202,428.17	1234-5678	Joint Tenant						
$172,686.58	2345-6789	Joint Tenant						
$144,118.36	3456-7890	Roth IRA	Susan Clients	100.00%	$144,118.36	Child A Clients	50.00%	$72,059.18
						Child B Clients	50.00%	$72,059.18
$793,196.96	4567-8901	IRA	Susan Clients	100.00%	$793,196.96	Child A Clients	50.00%	$396,598.48
						Child B Clients	50.00%	$396,598.48
$118,494.21	12345667	Allianz 360 - IRA	Clients, Susan	100.00%	$118,494.21	The Clients Family Trust	100.00%	$118,494.21

Investments | Clients, Susan

Value	Account Name	Account Title	Primary	Primary	Beneficiary	Contingent	Contingent	Contingent

$660,018.56	6789-0123	IRA	Robert Clients	100.00%	$660,018.56	Child A Clients	50.00%	$330,009.28
						Child B Clients	50.00%	$330,009.28
$652,135.9	7890-1234	Roth IRA	Robert Clients	100.00%	$652,135.90	Child A Clients	50.00%	$326,067.95
						Child B Clients	50.00%	$326,067.95

*This is our Beneficiary Report
* The Operations Department pulls this information to give to the Financial Planner to review
*A copy if given to the client for them to review and ensure all information is corret