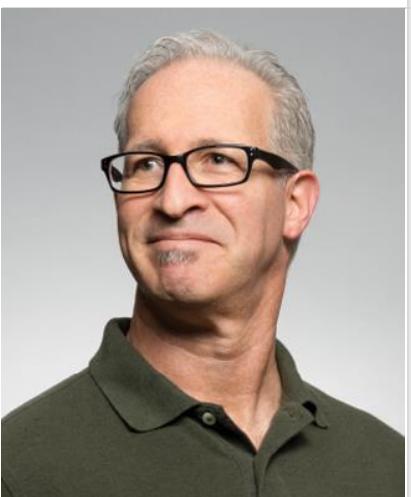


Client / Age	Assets / Pensions / 401(k) / Stock Options	Family	Goals	Referral Prospects	Lifestyle Interests & Financial Concerns
 Charles (55) & Jean (52) Walters	\$2,000,000 / \$900,000 / \$200,000 / \$3,500,000	Son Tom (15) Father Bill (80)	Asset Accumulation College Planning	Sue James (Sister) Bob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