

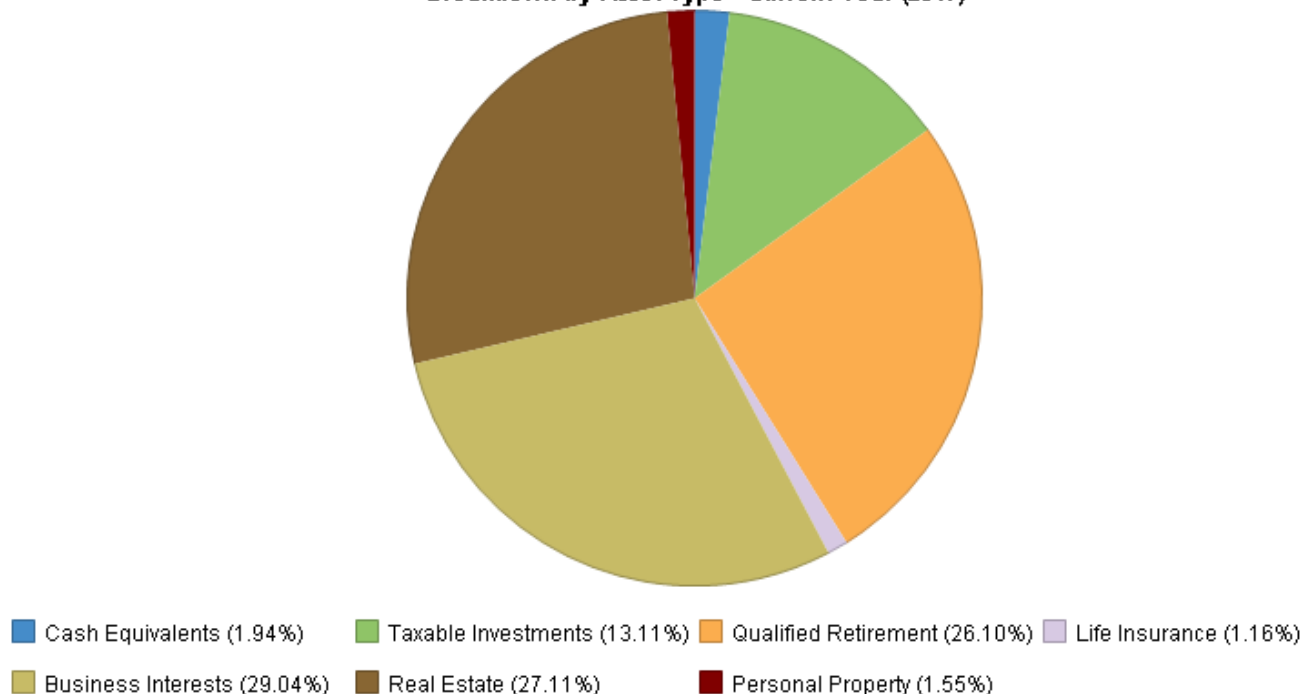
Balance Sheet

Prepared for Paul and Lynn Price

The Balance Sheet shows the value of your assets and liabilities, and your net worth.

Assets	Paul	Lynn	Joint - ROS	Total
Lynn and Paul Savings	--	--	\$100,000	\$100,000
Paul and Lynn's Joint Investments	--	--	676,950	676,950
Inherited IRA from Paul's Dad	194,379	--	--	194,379
Paul's Price Wealth Advisors 401(k)	1,153,512	--	--	1,153,512
Price Wealth Advisors, LLC	1,500,000	--	--	1,500,000
Primary Residence	--	--	1,000,000	1,000,000
Shore House	--	--	400,000	400,000
Lynn's Car	--	30,000	--	30,000
Paul's Car	50,000	--	--	50,000
Lynn's Whole Life	--	5,000	--	5,000
Paul's Whole Life	55,000	--	--	55,000
Total Assets:	2,952,891	35,000	2,176,950	5,164,841
Liabilities	Paul	Lynn	Joint - ROS	Total
Home Mortgage	--	--	(\$200,000)	(\$200,000)
Vacation Home Mortgage	--	--	(100,000)	(100,000)
Lynn's Car Loan	--	(20,000)	--	(20,000)
Paul's Car Loan	(40,000)	--	--	(40,000)
Total Liabilities:	(40,000)	(20,000)	(300,000)	(360,000)
Total Net Worth:	\$2,912,891	\$15,000	\$1,876,950	\$4,804,841

Breakdown by Asset Type - Current Year (2017)



This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/ representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.