

Jeremy and Lorrie Esposito ▾

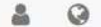
OVERVIEW

FACTS

PLANS

REPORTS

VAULT



Net Worth
\$17,169,811
as of today

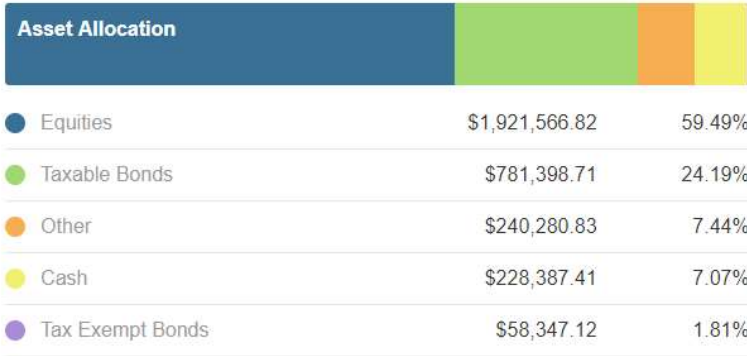
▲ \$13,123,882 this month

▲ \$13,609,063 since Nov 2014

Investments
\$3,229,986
as of today

▲ \$154,057 this month

▲ \$817,544 since Nov 2014



	As Of	Holdings	Value	Today's Change
Assets Under Management			\$1,519,986	▲ 0.40%
Jeremy's 401(k) ▾	11/5/2014 10:42 AM	\$0	\$1,000,000	--
Lorrie's IRA ▾	2/15/2019 4:00 PM	\$469,986	\$469,986	▲ 1.30%
Survivorship Policy ▾	2/18/2019 1:11 PM	\$0	\$50,000	--
Assets Held Away			\$1,710,000	
Deferred Compensation ▾	11/5/2014 10:45 AM	\$0	\$800,000	--
Jeremy and Lorrie Fidelity Account ▾	11/5/2014 10:36 AM	\$0	\$710,000	--
Joint Checking ▾	11/5/2014 10:35 AM	\$0	\$20,000	--
Joint Vanguard Account ▾	11/5/2014 10:36 AM	\$0	\$180,000	--

Go back to Plans

DECISIONCENTER

Go to Presentation

Selected Plan

Future Awards + Late Exer

TECHNIQUES

Modify

- Option Price Decreases 30%
- Downsize Home at age 65 - NET \$400,000
- GIFT \$20,000/YR For 10YRs For Education
- Health Care Expense @80 \$300,000
- Reduce Social Security 25%
- 5% Increase in taxes starting today
- Reduce Retirement Lifestyle to \$160,000

All On - All Off

ADVANCED TECHNIQUES

Advanced

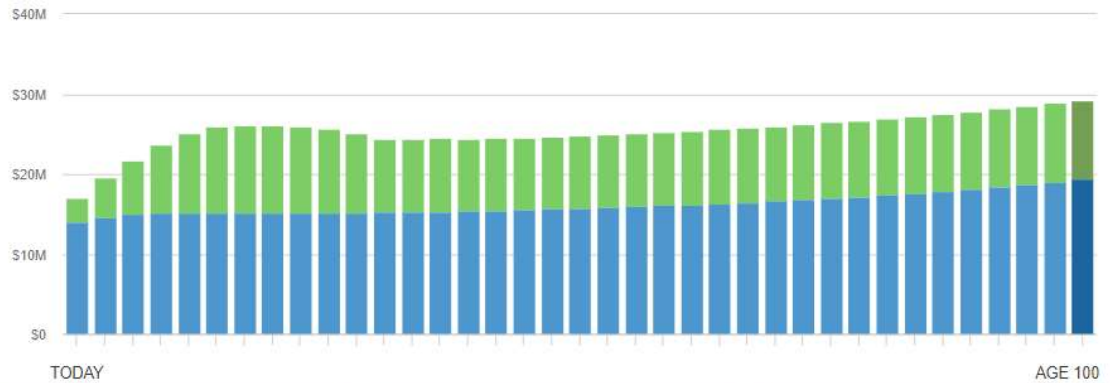
- Stock Option

All On - All Off

Selected Report

Lifetime Portfolio Value

View in Present Value



ASSETS LAST UNTIL
Age 100

FUNDING GAINED
0 Years

VALUE GAINED
+\$9,876,969

Details by Year: 2055

JEREMY 100 LORRIE

	Portfolio Assets	Net Worth
BEFORE	\$19,405,120	\$23,365,674
AFTER	\$29,282,089	\$33,242,643
NET	+\$9,876,969	+\$9,876,969