**JOHN & JANE JOHNSON**

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| --- | --- | --- |
| **Total Deposits** | **Total Withdrawals** | **Portfolio Value Now** |
| $ | $ | $ |

|  |  |  |
| --- | --- | --- |
| **Acct Ending:** | **List of Holdings:** | **Current Value:** |
| 9156 | Schwab – John/Roth | $ |
| 5584 | Schwab – Jane/IRA | $ |
| 5765 | Schwab – Jane/NQ | $ |
| 9023 | Schwab – Joint/NQ | $ |
| 1398 | SILAC – John/NQ | $ |
| 6549 | F&G – Jane/IRA | $ |

|  |  |
| --- | --- |
| **Bank Account** | **Total Banking Value** |
|  | $ |

RMDs: John due 2063 Jane due 2038