

Financial Snapshots

for

Howard Sloan

413 Bess Road

Statesville, NC 28625

704-876-3329

prepared by... Rick McClanahan



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Financial Snapshot

Owner	Category	Company	Value	Qualified	Allocation	Death Benefit
Howard & Christine	Checking	The Hartford	\$72,140	Non-Qualified	A	\$0
Howard	Stock	BB&T	\$817,268	Non-Qualified	C	\$0
Howard	Variable Annuity	The Hartford	\$82,466	IRA	C	\$0
Howard & Christine	Variable Annuity	The Hartford	\$207,667	Non-Qualified	C	\$0

Client Signature

Date

Client Signature

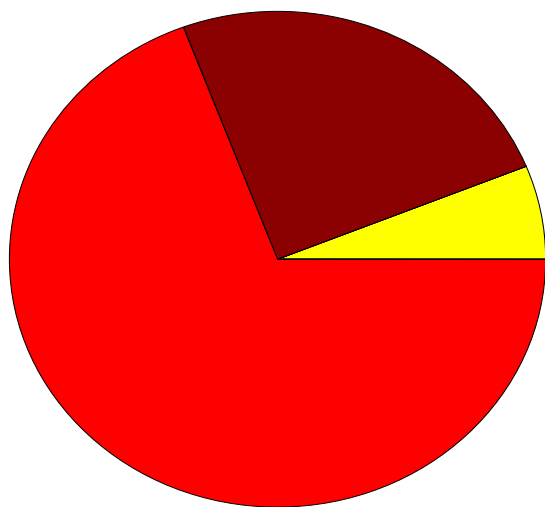
Date

Financial Snapshot

Summary

Total Assets	\$1,179,541
Total Investable	\$1,179,541
Total Debts	\$0
Net Worth	\$1,179,541
Net Estate Value	\$1,179,541
Qualified	\$82,466
Nonqualified	\$1,097,075
Allocation A	6%
Allocation B	25%
Allocation C	69%

Snapshot Breakdown



- Cash \$72,140
- Bonds \$0
- Var Annuities \$290,133
- Life Ins \$0
- Other \$0
- Money Mkt \$0
- Annuities \$0
- Equities \$817,268
- Real Estate \$0

Client Signature

Date

Client Signature

Date

Insurance and annuity products are sold separately through Legacy First Financial Group LLC.

Personal Snapshot

First Name	Howard	First Name	Christine
Last Name	Sloan	Last Name	Sloan
Gender	Male	Gender	Female
Age	73	Age	
SS#		SS#	
Birthdate		Birthdate	
Mother's Maiden Name		Mother's Maiden Name	
Home Address	413 Bess Road	Home Address	413 Bess Road
City	Statesville	City	Statesville
State	NC	State	NC
Zip	28625	Zip	28625
Place of Birth		Place of Birth	
Mailing Address		Mailing Address	
City		City	
State		State	
Zip		Zip	
Home Phone	704-876-3329	Home Phone	704-876-3329
Alt Phone		Alt Phone	
Email Address		Email Address	
Citizenship		Citizenship	
Trust Name		Trust Name	
Trust Date		Trust Date	
Trust Tax ID		Trust Tax ID	
Trustees		Trustees	
Trustees		Trustees	
Successor Trustees		Successor Trustees	
Successor Trustees		Successor Trustees	
Trust Beneficiaries		Trust Beneficiaries	
Employment Status		Employment Status	
Employer		Employer	
Employer Address		Employer Address	
City		City	
State		State	
Zip		Zip	
Occupation		Occupation	
Employer Phone		Employer Phone	
DL State of Issue		DL State of Issue	
DL#		DL#	
DL Issue Date		DL Issue Date	
DL Expiration Date		DL Expiration Date	

Initial

Date

Initial

Date

Personal Snapshot

Source of Funds		Source of Funds	
Income from Earnings	No	Income from Earnings	No
Gift	No	Gift	No
Investment Proceeds	No	Investment Proceeds	No
Sale of Business	No	Sale of Business	No
Inheritance	No	Inheritance	No
Legal Settlement	No	Legal Settlement	No
Pension/IRA/Retirement Savings	No	Pension/IRA/Retirement Savings	No
Spouse/Parent	No	Spouse/Parent	No
Lottery/Gaming Proceeds	No	Lottery/Gaming Proceeds	No
Insurance Proceeds	No	Insurance Proceeds	No

Initial

Date

Initial

Date

What If? S&P 500

Original Allocation

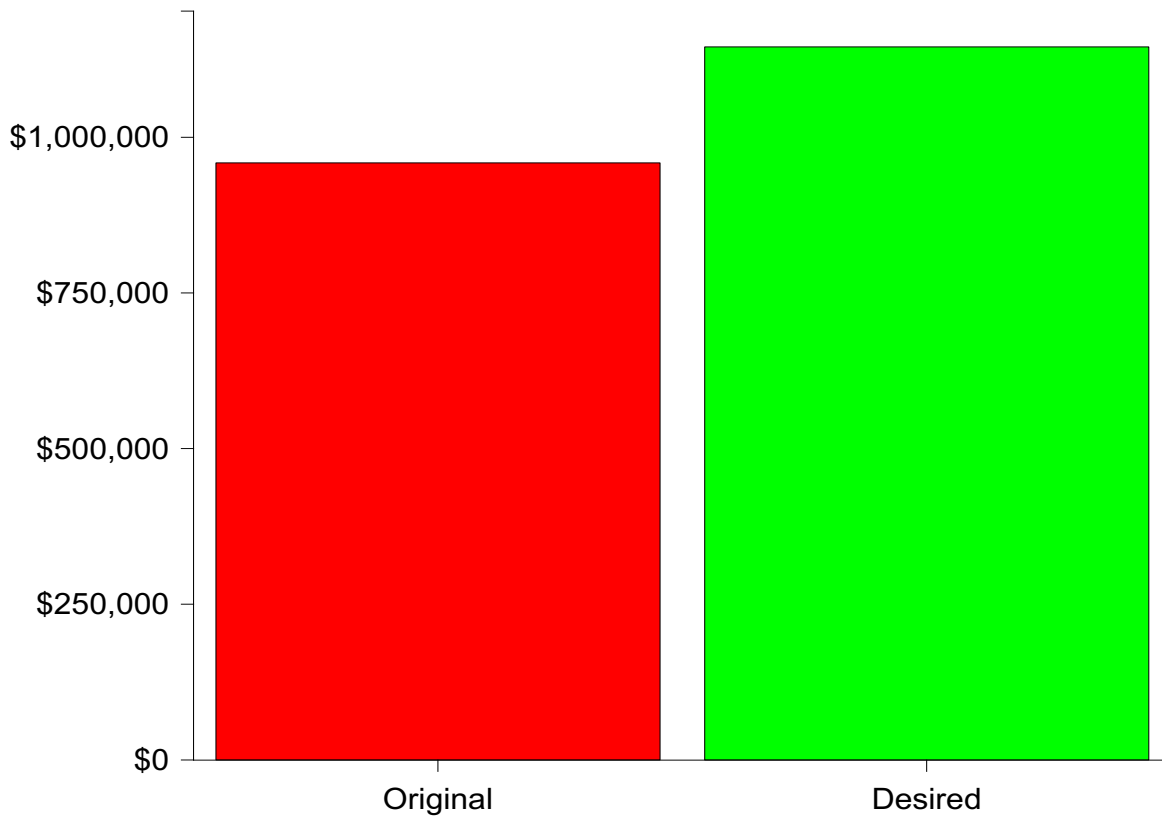
	A Interest	B Cap	C			
2000-2009	3%	7%	S&P 500	Total	Dollar	Percent
S&P 500 Returns:	\$72,140	\$0	\$1,107,401	\$1,179,541	Gain/Loss	Gain/Loss
-11.81%	\$74,304	\$0	\$976,549	\$1,050,853	-\$128,687	-10%
-10.02%	\$76,533	\$0	\$878,686	\$955,220	-\$95,633	-9%
-21.27%	\$78,829	\$0	\$691,758	\$770,587	-\$184,632	-19%
21.94%	\$81,194	\$0	\$843,536	\$924,731	\$154,143	20%
8.44%	\$83,630	\$0	\$914,765	\$998,395	\$73,664	7%
5.55%	\$86,138	\$0	\$965,538	\$1,051,677	\$53,281	5%
11.64%	\$88,723	\$0	\$1,078,011	\$1,166,734	\$115,057	10%
2.15%	\$91,384	\$0	\$1,101,267	\$1,192,652	\$25,917	2%
-35.61%	\$94,126	\$0	\$709,086	\$803,212	-\$389,439	-32%
21.59%	\$96,950	\$0	\$862,188	\$959,138	\$155,926	19%
Total After 10yrs	\$96,950	\$0	\$862,188	\$959,138	-\$220,402	-18%
Percent	6%	0%	93%	100%		

Desired Allocation

	A Interest	B Cap	C			
2000-2009	3%	7%	S&P 500	Total	Dollar	Percent
S&P 500 Returns:	\$70,772	\$294,885	\$813,883	\$1,179,541	Gain/Loss	Gain/Loss
-11.81%	\$72,895	\$294,885	\$717,714	\$1,085,495	-\$94,045	-7%
-10.02%	\$75,082	\$294,885	\$645,790	\$1,015,757	-\$69,737	-6%
-21.27%	\$77,334	\$294,885	\$508,407	\$880,627	-\$135,130	-13%
21.94%	\$79,655	\$315,527	\$619,956	\$1,015,138	\$134,511	15%
8.44%	\$82,044	\$337,614	\$672,305	\$1,091,964	\$76,825	7%
5.55%	\$84,506	\$356,353	\$709,621	\$1,150,480	\$58,515	5%
11.64%	\$87,041	\$381,297	\$792,283	\$1,260,622	\$110,142	9%
2.15%	\$89,652	\$389,523	\$809,375	\$1,288,551	\$27,928	2%
-35.61%	\$92,342	\$389,523	\$521,142	\$1,003,007	-\$285,543	-22%
21.59%	\$95,112	\$416,790	\$633,664	\$1,145,567	\$142,559	14%
Total After 10yrs	\$95,112	\$416,790	\$633,664	\$1,145,567	-\$33,973	-2%
Percent	5%	25%	69%	100%		

What If? S&P 500

Total After 10yrs



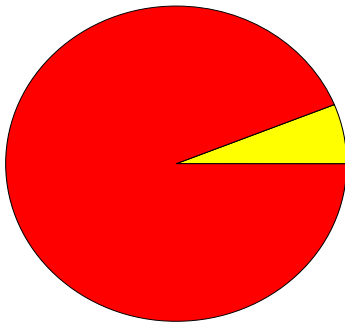
ABC Allocation Summary

Original Allocation

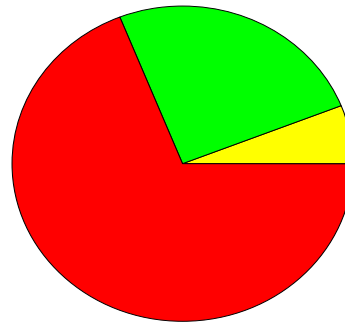
A	B	C
\$72,140	\$0	\$1,107,401
6%	0%	93%

Desired Allocation

A	B	C
\$70,772	\$294,885	\$813,883
5%	25%	69%



● A - \$72,140 ● B - \$0
● C - \$1,107,401



● A - \$70,772 ● B - \$294,885
● C - \$813,883

Disclosure

Insurance and annuity products are sold separately through Legacy First Financial Group LLC.

The information provided in these materials is for illustrative purposes only. Opinions, forecasts and recommendations are solely those of Legacy First Financial Group LLC. The projections used, including inflation rates and investment rates of return, are estimates only and in no way guarantee future performance. The assumptions and calculations are estimates and are meant to serve solely as a guideline. If any assumptions used in these materials are not realized, then the calculations will be inaccurate. There is no express or implied guaranty or warranty that any result shown will be achieved.

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