# NET WORTH

SEPHTON FINANCIAL

WIDOW & WISDOM™

**Sephton Financial, LLC**

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| ASSETS | AMOUNT |
| --- | --- |
| **Primary Residence** | |
| **2nd Property(s)** | |
| **Vehicles** | |
| **Boats** | |
| **Art/Jewelry/Antiques** | |
| **Cash Savings** | |
| Money Market Savings | |
| CD's | |
| Checking Savings | |
| **Life Insurance** | |
| Personal | |
| Group | |
| Mortgage | |
| Line of Credit | |
| **Vacation Pay** | |

| ASSETS | AMOUNT |
| --- | --- |
| **Retirement Savings** | |
| **Tax Deferred** | |
| 401(k) | |
| 403(b) | |
| 457 | |
| SIMPLE | |
| SEP IRA | |
| Traditional IRA | |
| Annuities | |
| **Tax Free** | |
| ROTH savings | |
| Municipal Bonds | |
| **Brokerage Account (nonqualified)** | |
| Stock Options | |
| Mutual Funds | |
| Stocks | |

| ASSETS | AMOUNT |
|---|---|
| **Bonds** | |
| Corporate | |
| Government | |
| Municipal | |
| **Business Value** | |
| **Other** | |
| **TOTAL ASSETS** | |

| LIABILITIES | AMOUNT |
|---|---|
| **Mortgage** | |
| **Other Property Mortgage(s)** | |
| **Home Equity Loan** | |
| **Personal Loan** | |
| **Education Loans** | |
| **Credit Card** | |
| **Car Loan** | |
| **Business Loan** | |
| **TOTAL LIABILITIES** | |

| | |
|---|---|
| **TOTAL ASSETS** | |
| **MINUS TOTAL LIABILITIES** | |
| **NET WORTH** | |

NOTES:

**IMPORTANT DISCLOSURES:**

Registered Representative offering securities through Cetera Financial Specialists LLC, member FINRA/SIPC. Advisory services are offered through Cetera Investment Advisers LLC. Cetera is under separate ownership from any other named entity. Sephton Financial, LLC and Cetera are not affiliated.

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

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