

Bennett, Alex Net Worth Report

A snapshot of assets, liabilities, and ownership details.
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FSO WEALTH

TOTAL ASSETS

\$899,000

TOTAL LIABILITIES

\$132,000

NET WORTH

\$767,000

● Qualified Assets 76% ● Cash & Equivalents 14% ● Non-Qualified Assets 10%

ASSETS

Cash & Equivalents 2 accounts **\$130,000**

ACCOUNT	CUSTODIAN	OWNER	BALANCE
Savings Savings Account	Manual Entry	Alex Bennett, Morgan Bennett	\$95,000
Family Checking Checking Account	Manual Entry	Alex Bennett, Morgan Bennett	\$35,000

Non-Qualified Assets 1 account **\$88,000**

ACCOUNT	CUSTODIAN	OWNER	BALANCE
Taxable Brokerage Brokerage Account	Manual Entry	Alex Bennett, Morgan Bennett	\$88,000

Qualified Assets 7 accounts **\$681,000**

ACCOUNT	CUSTODIAN	OWNER	BALANCE
TSP Alex Traditional Thrift Savings Plan (TSP)	Thrift Savings Plan	Alex Bennett	\$485,000
Old 401(k) 401(k)	Manual Entry	Morgan Bennett	\$76,000
Roth IRA Morgan Roth IRA	Manual Entry	Morgan Bennett	\$62,000
Roth IRA Alex Roth IRA	Manual Entry	Alex Bennett	\$28,000
TSP Morgan Traditional Thrift Savings Plan (TSP)	Thrift Savings Plan	Morgan Bennett	\$18,000
Traditional IRA Traditional IRA	Manual Entry	Morgan Bennett	\$12,000
529 529 College Savings Plan Beneficiaries: Primary: Avery Bennett	Manual Entry	Alex Bennett	\$0

SAMPLE

LIABILITIES

Other Liabilities 2 accounts			\$132,000
ACCOUNT	CUSTODIAN	OWNER	BALANCE
Student Loans (PSLF) Federal Direct Unsubsidized	Manual Entry	Alex Bennett	\$118,000
Auto Loan (SUV, purchased before current tour) Loan	Manual Entry	Alex Bennett	\$14,000
Total assets			\$899,000
Total liabilities			\$132,000
NET WORTH			\$767,000

SAMPLE