

**John Doyle (58)**  
Primary

**Maureen Doyle (53)**  
Spouse

**Eva Doyle (29)**  
Dependent

**Mary Sue Doyle (86e)**  
Family

**Spencer Doyle (14e)**  
Family

**Anthony Shaw COO (63)**  
Business Partner

**Scotty Padgett CFO (55)**  
Business Partner

**Employees @Widgets (48e)**  
Other

**Widgets, Inc Corporation - C Corp**

**Doyle Family Rev Trust - Revocable**

**Maureen Doyle Rev Trust - Revocable**

**Doyle Trust IDGT Trust - Irrevocable**

**ILIT Trust - Irrevocable**

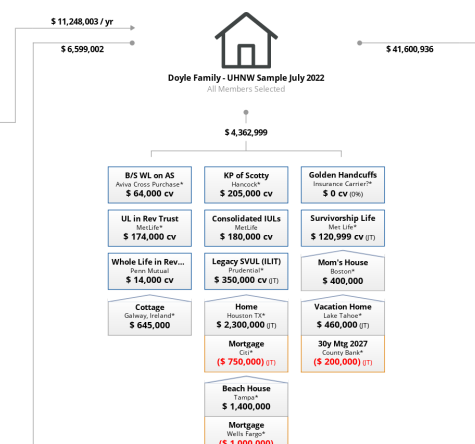
**Mount Carmel High School Charity - Public**

Dist. Coordinator Widgets Inc.*	\$ 38,000/yr
CEO 1 Widgets Inc.*	\$ 480,000/yr
Income ABC	\$ 300,000/yr
Base Salary Employee*	\$ 1/yr
Incentive/Bonus Employee*	\$ 1/yr
Annual Revenue Sales*	\$ 8,000,000/yr
Bonus Employee*	\$ 175,000/yr
CFO Widgets Inc.*	\$ 175,000/yr
COO Widgets Widgets Inc.*	\$ 130,000/yr
Annuity Jackson National*	\$ 70,000/yr
Annual Gifts Received*	\$ 30,000/yr
Corp. Dividend Widgets Inc.*	\$ 1,000,000/yr
Future Pension Employee**	\$ 1/yr
Exp. Pension @65 Pension**	\$ 1/yr fv
Rental Income Houston Office*	\$ 350,000/yr
Rental Income Trust Properties*	\$ 150,000/yr
SocSec @ 67	\$ 32,000/yr
Other Income Source**	\$ 1/yr
Living Expenses John's Expenses*	(\$ 400,000)/yr
Rental Income Widgets Properties**	\$ 420,000/yr

IRA Annuity Source*	\$ 250,000
401k Fidelity 17.5%yr	\$ 5,100,000
Profit Sharing Plan Investment**	\$ 1
Salary Deferral Plan Investment**	\$ 1
ROTH IRA Schwab*	\$ 100,000
Old 403b Value*	\$ 49,000
Joes 401k Vanguard*	\$ 700,000
ESOP Widgets Inc.*	\$ 400,000

B/S WL on AS Annu Cross Purchase*	\$ 500,000
Group Term Life Carrier**	\$ 1
Buy/Sell Term SP Carrier Johnson*	\$ 500,000
KP of Scotty Helios**	\$ 1,000,000
Buy Sell Term Insurance Carrier**	\$ 1
Golden Handcuffs Insurance Carrier**	\$ 1
Key Person Term Insurance Carrier**	\$ 1
Term20 exp 2019 Insurance**	\$ 500,000
Term Insurance Lincoln*	\$ 500,000
Key Man Term AS Helios**	\$ 1,000,000
UL in Rev Trust MetLife*	\$ 750,000
Consolidated IULs MetLife	\$ 650,000
Survivorship Life Met Life*	\$ 1,500,000
Whole Life in Rev... Penn Mutual	\$ 250,000
Legacy SVUL (ILIT) PennMutual*	\$ 6,000,000
Group Medical Carrier**	\$ 500/mo
Group LTD Taxable Carrier**	\$ 1/mo
Voluntary LTD Carrier**	\$ 1/mo
Disability Insurance Northwestern Mutual**	\$ 2,400/mo
P&C Company**	\$ 5,000,000

Savings Bank of America*	\$ 187,000 (IT)
Checking Bank of America*	\$ 90,000 (IT)
Savings BankOne*	\$ 2,000,000
Business Checking BankOne*	\$ 1,400,000
Savings acct. BankOne*	\$ 10,000
Donor A F Broker	\$ 3,934,829
Managed Account Broker*	\$ 1,890,450
Assets in the US Coinbase*	\$ 1,000,000
Stock Options Company**	\$ 1
Stock Purchase Plan Company**	\$ 1
Rev Trust Brokerage BankOne*	\$ 150,000
GrandChilds Inherit... Grandpa Doyle Estate*	\$ 800,000 fv
Rev Trust Checking Harris Bank*	\$ 3,800,000
Jewelry	\$ 500,000
Mfg. Equipment	\$ 2,000,000
REIT IDGT/COLE Capital**	\$ 130,000
Expected Payment BankOne**	\$ 1,500,000 fv
Building Proceeds QIC Trust**	\$ 5,000,000
FV Interest ILIT*	\$ 300,000 fv
PEQ Deals Ltd Partners*	\$ 400,000
NQ Annuity Blue Bonnet**	\$ 150,000
Brokerage Merrill Lynch -2382*	\$ 200,654
Post Gift Mt. Carmel Fund**	\$ 1,500,000 fv
Post Gift CGA Mt. Carmel Fund**	\$ 1,000,000 fv
NQ Annuity Ohio National**	\$ 120,000
HSA Provider**	\$ 1
Managed Acct. South Capital**	\$ 600,000
UTMA Schwab*	\$ 48,000
Play Account Schwab #6388*	\$ 145,000
Play Account TD Ameritrade*	\$ 115,000
Spencer 529 Vanguard*	\$ 30,000
Commercial RE Widgets Properties*	\$ 10,000,000
Business Interest Widgets, Inc.*	\$ 8,000,000
Colligned Loan MetLife**	(\$ 1,800,000)



Cash Flow Real Estate Retirement Asset Non-Retirement Asset Liability Insurance Owned By Another Deferred Annuity Stencil

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