

Other Assets

The
Daniel
Plan

Worksheet

Real Estate:

- Property Address:

Private Investments:

- Investment Name:
- Title:
- Commitment Amount:
- Holding Period:
- Remaining Capital Calls:
- Advisor Info or Contact information:

Personal Items:

- Type:
- Value:
- Safe Keeping Location:
- Safe Deposit Box:
 - Titling:
 - Location:

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Additional Information

A decorative graphic in the top right corner consisting of a grid of hexagons. The central hexagon is white and contains the text 'The Daniel Plan'. The surrounding hexagons are light blue and some have lines extending from their vertices, creating a honeycomb-like structure.

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