

GENERAL INFORMATION										FINANCIAL DATA										OPERATIONAL DATA										ANALYTICAL DATA													
NO.	NAME	AGE	SEX	REL.	EDUC.	PROF.	INDUSTRY	EMPLOYER	ADDRESS	INCOME	EXPENSES	SAVINGS	DEBTS	ASSETS	LIABILITIES	NET WORTH	INVESTMENTS	RISK	RETURNS	PERFORMANCE	MARKET	SECTOR	COMPANY	PRODUCT	MARKET SHARE	GROWTH	PROFIT	LOSS	BREAK-EVEN	ROI	RISK	RETURNS	PERFORMANCE	MARKET	SECTOR	COMPANY	PRODUCT	MARKET SHARE	GROWTH	PROFIT	LOSS	BREAK-EVEN	ROI
1	John Doe	35	M	Spouse	High School	Teacher	Public School	ABC School	123 Main St	\$45,000	\$30,000	\$15,000	\$5,000	\$20,000	\$10,000	\$10,000	\$10,000	Low	5%	10%	12%	Education	ABC School	Public School	15%	5%	\$10,000	\$5,000	\$5,000	10%	Low	5%	10%	12%	Education	ABC School	Public School	15%	5%	\$10,000	\$5,000	\$5,000	10%
2	Jane Doe	32	F	Spouse	College	Engineer	Private Firm	XYZ Corp	456 Oak St	\$60,000	\$40,000	\$20,000	\$10,000	\$30,000	\$15,000	\$15,000	\$15,000	Medium	8%	15%	18%	Technology	XYZ Corp	Private Firm	20%	8%	\$15,000	\$10,000	\$5,000	15%	Medium	8%	15%	18%	Technology	XYZ Corp	Private Firm	20%	8%	\$15,000	\$10,000	\$5,000	15%
3	Bob Smith	45	M	Spouse	College	Manager	Retail Store	DEF Store	789 Pine St	\$55,000	\$35,000	\$20,000	\$15,000	\$25,000	\$10,000	\$15,000	\$15,000	Medium	7%	12%	15%	Retail	DEF Store	Retail Store	18%	7%	\$12,000	\$8,000	\$4,000	12%	Medium	7%	12%	15%	Retail	DEF Store	Retail Store	18%	7%	\$12,000	\$8,000	\$4,000	12%
4	Alice Brown	28	F	Spouse	College	Designer	Freelance	Freelance	101 Elm St	\$40,000	\$25,000	\$15,000	\$10,000	\$20,000	\$10,000	\$10,000	\$10,000	Low	6%	10%	12%	Design	Freelance	Freelance	12%	6%	\$8,000	\$5,000	\$3,000	8%	Low	6%	10%	12%	Design	Freelance	Freelance	12%	6%	\$8,000	\$5,000	\$3,000	8%
5	Charlie Green	50	M	Spouse	High School	Worker	Manufacturing	GHI Factory	202 Cedar St	\$35,000	\$20,000	\$15,000	\$10,000	\$15,000	\$10,000	\$10,000	\$10,000	Low	4%	8%	10%	Manufacturing	GHI Factory	Manufacturing	10%	4%	\$6,000	\$4,000	\$2,000	6%	Low	4%	8%	10%	Manufacturing	GHI Factory	Manufacturing	10%	4%	\$6,000	\$4,000	\$2,000	6%

100

