

In re Guardianship of Patricia A. Sahn

Revard v. Sahn Jr.

Petition for Injunction for Protection against Exploitation of Vulnerable Adult

Page 11 of 16

NATURE OF PROPERTY	VALUE
Real property located at: 21843 Town Place Drive, Boca Raton, FL 33433	\$511,545.00 per the Palm Beach County Property Appraiser; \$634,000.00 per Zillow.com
Bank of America Account ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	Unknown
Bank of America, Walter E. Sahn Jr Agency Account ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	\$112,904.00
Bank of America, Walter E. Sahn & Patricia A. Sahn Revocable Family Living Trust ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	\$48,943.02
Bank of America, Walter E. Sahn & Patricia A. Sahn Revocable Family Living Trust ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	\$15,226.20
Wells Fargo Walter E. Sahn Jr & Patricia A. Sahn Revocable Trust ending in [REDACTED] 7009 Beracasa Way, Boca Raton, FL 33433	\$24,792.87
Allianz Index Advantage IRA account ending in [REDACTED] PO Box 59060, Minneapolis, MN 55459- 0060	\$253,042.44
Investment Edge 21 VA IRA account ending in [REDACTED] Equitable Financial PO Box 1016, Charlotte, NC 28201-1016	\$260,804.77
JWC Financial IRA JW account ending [REDACTED] National Financial Services/JW Cole	\$105,537.27

In re Guardianship of Patricia A. Sahn

Revard v. Sahn Jr.

Petition for Injunction for Protection against Exploitation of Vulnerable Adult

Page 12 of 16

4301 Anchor Plaza, Suite 450 Tampa, FL 33614	
JWCA AUM IRA DZN account ending in [REDACTED] National Financial Services/JW Cole 4301 Anchor Plaza, Suite 450, Tampa, FL 33614	\$189,684.37
IRA-SEP JW account ending in [REDACTED] National Financial Services/JW Cole 4301 Anchor Plaza, Suite 450, Tampa, FL 33614	\$34,707.82
Patricia A. Sahn Revocable Trust AXA Annuity account ending in [REDACTED] Equitable Financial PO Box 1016, Charlotte, NC 28201-1016	\$329,157.03
Patricia A. Sahn Revocable Trust Midland Annuity account ending in [REDACTED] Midland Financial 8300 Mills Civic Parkway West Des Moines, IA50266	\$962,364.56
Patricia A. Sahn Revocable Trust Prudential Annuity account ending in [REDACTED] Prudential Securities PO Box 14533, Cincinnati, OH 45250-5433	\$225,015.53
Patricia A. Sahn Revocable Trust 1031 Exchange account ending in [REDACTED] JW Cole Financial 4301 Anchor Plaza, Suite 450 Tampa, FL 33614	\$50,564.17
Walter E. Sahn Irrevocable Life Insurance Trust JW Cole Financial 4301 Anchor Plaza, Suite 450 Tampa, FL 33614	\$218,371.96

6. Petitioners believe that the Vulnerable Adult's assets to be frozen are (check one):

worth less than \$1,500

worth between \$1,500 and \$5,000

worth more than \$5,000

7. Petitioners request that the following funds be frozen:

ACCOUNT	VALUE
Bank of America Account ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	Unknown
Allianz Index Advantage IRA account ending in [REDACTED] PO Box 59060, Minneapolis, MN 55459- 0060	\$253,042.44
Investment Edge 21 VA IRA account ending in [REDACTED] Equitable Financial, PO Box 1016, Charlotte, NC 28201-1016	\$260,804.77
JWC Financial IRA JW account ending [REDACTED] National Financial Services/JW Cole 4301 Anchor Plaza, Suite 450, Tampa, FL 33614	\$105,537.27
JWCA AUM IRA DZN account ending in [REDACTED] National Financial Services/JW Cole 4301 Anchor Plaza, Suite 450, Tampa, FL 33614	\$189,684.37
JW Cole Financial IRA-SEP JW account ending in [REDACTED] National Financial Services./ JW Cole 4301 Anchor Plaza, Suite 450 Tampa, FL 33614	\$34,707.82