

In re Guardianship of Patricia A. Sahm

Revard v. Sahm Jr.

Petition for Injunction for Protection against Exploitation of Vulnerable Adult

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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. Sahm Jr Agency Account ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	\$112,904.00
Bank of America, Walter E. Sahm & Patricia A. Sahm Revocable Family Living Trust ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	\$48,943.02
Bank of America, Walter E. Sahm & Patricia A. Sahm Revocable Family Living Trust ending in [REDACTED] 21060 St Andrews Blvd, Boca Raton, FL 33433	\$15,226.20
Wells Fargo Walter E. Sahm Jr & Patricia A. Sahm 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

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. Sahm Revocable Trust AXA Annuity account ending in [REDACTED] Equitable Financial PO Box 1016, Charlotte, NC 28201-1016	\$329,157.03
Patricia A. Sahm Revocable Trust Midland Annuity account ending in [REDACTED] Midland Financial 8300 Mills Civic Parkway West Des Moines, IA 50266	\$962,364.56
Patricia A. Sahm Revocable Trust Prudential Annuity account ending in [REDACTED] Prudential Securities PO Box 14533, Cincinnati, OH 45250-5433	\$225,015.53
Patricia A. Sahm Revocable Trust 1031 Exchange account ending in [REDACTED] JW Cole Financial 4301 Anchor Plaza, Suite 450 Tampa, FL 33614	\$50,564.17
Walter E. Sahm 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