

Financial Planner Case Study: Exhibit B

JPJP Stock	Shares	Date Acquired	Current Date	Cost Basis/Share	Current FMV Price
Lot 1	25	1/2/1985	2/1/2021	\$2.00	\$20.00
Lot 2	25	8/9/1986	2/1/2021	\$4.00	\$20.00
Lot 3	25	7/5/2020	2/1/2021	\$12.00	\$20.00
Lot 4	25	7/1/2019	2/1/2021	\$15.00	\$20.00
Lot 5	25	10/9/2020	2/1/2021	\$10.00	\$20.00
Lot 6	25	2/1/2020	2/1/2021	\$15.00	\$20.00