



# **Chubb 2021 Client Management School:**

## **Case Study 1**

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**Version 1.0**

## Case 1

### Case Study for Jones/Smith Family

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#### Family Profile

Alex Jones and Peyton Smith work for publicly held enterprises. Alex is the CFO of XYZ and Peyton is CIO of ABC. They have 2 teenagers. Alex and Peyton love to entertain friends and take vacations.

#### Detailed Information:

##### Alex Jones & Peyton Smith – Net Worth \$8M

###### Location:

Primary Location - 1174 South Fort Lamar Road, East Charleston, SC

\$1,000,000	Dwelling
\$ 250,000	Other Structures
\$ 700,000	Personal Property

Secondary Location – 2 Left Point Retreat, Savannah, GA 31411

\$3,000,000	Dwelling
\$1,000,000	Other Structures
\$ 650,000	Personal Property

###### Collection:

\$300,000 jewelry  
\$250,000 wine

###### Cars:

2019 Range Rover  
2022 Audi A5  
2021 Honda Accord  
2015 Honda Civic

###### Drivers:

Alex Jones  
Peyton Smith  
Son – Josh 16  
Son – Jason 18

###### Driving Activity:

2 speeds