

## Financial Information

<b>Assets</b> (Estimated Current Fair Market Value)	<u>Titled Jointly</u>	<u>Titled In Husband's Name Only</u>	<u>Titled In Wife's Name Only</u>
Primary Residence			
Other Real Estate	_____	_____	_____
Checking Account	_____	_____	_____
Savings or Money Market Account	_____	_____	_____
Certificates of Deposit			
Note(s) Receivable	_____	_____	_____
Stocks & Bonds	_____	_____	_____
Partnerships	_____	_____	_____
Closely Held Business	_____	_____	_____
Personal Property	_____	_____	_____
Total Assets	_____	_____	_____
<b>Liabilities</b>			
Home Mortgage	_____	_____	_____
Other Real Estate Mortgages	_____	_____	_____
Other Debts	_____	_____	_____
Total Liabilities	_____	_____	_____
<b>NET WORTH</b>	_____	_____	_____

### Profit Sharing, IRA or Pension Plans

	Description	1st/2nd Beneficiary	Current Value
1			
2			
3			

### Life Insurance Policies and/or Annuities

	Name of Company	Policy Owner	1st/2nd Beneficiary	Death Benefit
1				
2				
3				