



Financial Information

Assets (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	=====	=====	=====
Liabilities			
Home Mortgage	_____	_____	_____
Other Real Estate Mortgages	_____	_____	_____
Other Debts	_____	_____	_____
Total Liabilities	=====	=====	=====
NET WORTH	=====	=====	=====

Profit Sharing, IRA or Pension Plans

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

Life Insurance Policies and/or Annuities

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



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...Representing Individuals and Businesses in the Protection
and Preservation of Personal Wealth



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