

Your Name(s):

## **FINANCIAL INFORMATION**

Description	Husband/Single	Wife
Where Currently Employed or From Where Retired		
Description	Husband/Single	Wife
Annual Income (from all sources)		

### **Asset Summary**

Please provide current rounded values for purpose of estimating cost of Estate Settlement / Taxation at Death.

Description	Husband/Single	Wife	Jointly-Held By Husband & Wife, Or With Others
Real Estate (Provide the total "Fair Market Value" of all Real Estate owned, <u>without</u> regard to any mortgage balances)			
Cash, Savings, Checking, Money Market Accounts			
Certificates of Deposit (i.e., Not included under "Retirement Funds" below)			
Stocks and Securities (i.e., Those <u>not included</u> under "Retirement Funds" below)			
U.S. Savings Bonds, Notes, Bills (i.e., Those <u>not included</u> under "Retirement Funds" below)			
Mutual Funds, Corporate Bonds, Municipal Bonds (i.e., Those <u>not included</u> under "Retirement Funds" below)			
Retirement Funds (IRA's, Pensions, 401K Plans, 403B Plans, TSA's, etc.)			
Motor Vehicles and Aircraft (Automobiles, Motorcycles, Boats, RVs, Fixed-Wing, Helicopters, etc.)			
Personal Property (Household furnishings, Jewelry, Collectibles, Antiques, Firearms, Recreational Equipment, Show Animals, Hobby Supplies, Royalties, etc.)			
Loans Receivable (e.g., Money owed to you, to include by children or other family members)			
Prospective Inheritance (Include your estimated proportional share of their current estate, regardless of their age or health)			
Agricultural Assets (Livestock, Crops, Equipment, Machinery, Coop Shares, Futures, etc.)			
Business Ownership (Any Professional Practice, LLC, LLP, Corporation, Family Limited Partnership, General Partnership, Sole Proprietorship or other Business Entity)			
Business Equipment (Any personally-owned Business Equipment, Inventory, and Machinery)			
Life Insurance (Provide the total value of all Life Insurance Policy "death benefit" amounts, <u>not the cash value</u> )			
Non-Qualified Annuities (List total value of all Non-Qualified Annuity Contract amounts)			
<b>Total Assets</b>			

## Liabilities

Please provide current rounded values for purpose of determining Estate Net Worth below.

Description	Husband/Single	Wife	Joint With Spouse
Mortgages (List any type of debt secured by a lien on real estate, including home improvement loans, etc.)			
Auto Loans			
Credit Cards			
Personal Debts to Banks, Finance Companies, etc.			
Personal Debts to Individuals, Others			
Amount Borrowed on Life Insurance			
<b>Total Liabilities</b>			

## Estate Net Worth

(Total Assets -Total Liabilities)

<b>Net Worth</b>			
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## Real Estate Ownership

Please remember to provide copies evidencing your ownership interest in any real estate (e.g., Abstracts, Deeds, Title Insurance Policies, Contracts, etc.).

Street Address (List home first)	Original Purchase Price	Mortgage Balance	Current Market Value
1			
2			
3			
<b>Totals</b>			