

Children (Please indicate if any children are from a prior marriage or if any children are deceased):

<u>Name</u>	<u>Birthdate</u>	<u>Residence, City and State</u>	<u>Marital Status</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

ASSETS

REAL ESTATE

Please list each piece of real property by address, description (i.e. primary residence, secondary residence, land, vacation home, rental property, commercial property) and asset value.

	<u>Address</u>	<u>Description</u>	<u>Value</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

BANK ACCOUNTS

Please list by Bank and Account Number, type (i.e. checking, savings, CD, money market) and value.

	<u>Bank and Account Number</u>	<u>Type</u>	<u>Value</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

INVESTMENT

Please list by Bank/Broker and Account Number, type (i.e. bonds, common stock, mutual fund, Ltd. Partnership, preferred stock, etc.) and value.

	<u>Bank/ Broker and Account Number</u>	<u>Type</u>	<u>Value</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

RETIREMENT

Please list by Bank/Broker and Account Number, type (i.e. 401k, 403b, IRA, Qualified Plan, SEP/IRA, etc.) and value.

	<u>Bank/ Broker and Account Number</u>	<u>Type</u>	<u>Value</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

INSURANCE

Please list by Insurance Company and Policy Number, type (i.e. term policy, whole life policy, universal life policy, variable life policy) and value.

	<u>Insurance Company and Policy Number</u>	<u>Type</u>	<u>Value</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

BUSINESS

Please list by Name, type (i.e. general partnership, limited partnership, C corporation, S corporation, sole proprietorship, LLC, etc.) and value.

	<u>Name of Company</u>	<u>Type</u>	<u>Value</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

OTHER

Please list other assets of significant value by type (i.e. boats, collectibles, automobiles, etc.) and value.

	<u>Type</u>	<u>Value</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____

LIABILITY

Please list all debts and liabilities by type (i.e. mortgage, credit line, personal loan, other loan, etc.) and amount.

	<u>Type</u>	<u>Value</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____

PREVIOUS ESTATE PLANNING

Do you currently have a will or trust?

Has your will or trust ever been amended?