

FINANCIAL INFORMATION

Ownership, or how you hold title to property, is extremely important. In the ownership column below, indicate how title to each asset is held using the following designations:

“C” = Community Property

“J” = Joint Tenants With Right of Survivorship

“W” = Wife’s Separate Property

“H” = Husband’s Separate Property

ASSET	VALUE	OWNER
Cash Accounts (Checking, Savings, Money Market, CD=s)		
Husband=s Retirement Plans (IRA=s, 401(k), Roth IRA)		
Wife=s Retirement Plans (IRA, 401(k), Roth IRA)		
Investment Accounts		
Publicly Traded Stock		
Bonds		
Home		
Other Real Estate (Vacation House, Rental Property)		
Mineral Interests (Oil, Gas, Ore, etc.)		
Annuities		
Notes & Receivables (Money Owed to You)		
Business Interests (Partnerships, Family Business)		
Motor Vehicles		
Personal Property (Jewelry, Collections, Furnishings, etc.)		
Husband=s Life Insurance (Death Benefit)		
Wife=s Life Insurance (Death Benefit)		
Anticipated Gifts & Inheritance		
Other Assets (Stock Options, etc. - specify)		
LIABILITIES		
Mortgages		
Accounts Payable		

Loans Against Life Insurance		
Other Obligations		
NET ESTATE		

I/We certify that the assets and approximate values shown are complete and correct. I/We understand that planning advice may change if this is not true; advice given, if any, will be based on the information provided.
