

CASH / CDs / CHECKING / SAVINGS:

Owner(s)	Account Type	Bank	Account Number	Present Value	Basis and Acquisition Date

STOCKS / BONDS / MUTUAL FUNDS / BROKERAGE ACCOUNTS:

Owner(s)	Investment Type	Company	Account Number	Present Value	Basis and Acquisition Date

IRA/ 401(K) / TSP / PENSION, AND OTHER RETIREMENT ACCOUNTS:

Owner	Type of Account IRA, Roth IRA, 401(k), TSP, Pension, Other	Company	Beneficiary: Primary/ Contingent	Current Value
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	

CLOSELY-HELD BUSINESS INTERESTS:

Owner(s)	Type of Business	Percent Owned	Basis/Acquisition Date	Present Value

REAL ESTATE: Please try to provide a copy of each deed.

Owner(s)	Address	Date Purchased	Basis	Approximate Fair Market Value

LIFE INSURANCE:

Owner	Insured	Insurance Company	Beneficiary: Primary/ Contingent	Whole	Term	Death Benefit
			Primary:	<input type="checkbox"/>	<input type="checkbox"/>	
			Contingent:			
			Primary:	<input type="checkbox"/>	<input type="checkbox"/>	
			Contingent:			
			Primary:	<input type="checkbox"/>	<input type="checkbox"/>	
			Contingent:			
			Primary:	<input type="checkbox"/>	<input type="checkbox"/>	
			Contingent:			

ANNUITIES:

Owner(s)	Type	Company	Beneficiary: Primary/ Contingent	Current Value
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	
			Primary:	
			Contingent:	

PERSONAL PROPERTY: Please provide estimated value of all person property that has significant value

Household Furniture	Antiques	Jewelry	Other

Automobile: Year Make Model	Estimated Value	Owner

MORTGAGES / DEBTS / OTHER OBLIGATIONS:

Owed By:	Type of Debt	Outstanding Balance	Holder of Debt