

**ASSET INFORMATION**

Holden & Campbell, 716 Melvin Ave., Annapolis, Maryland 21401 (410) 263-1667 [www.HoldenCampbell.com](http://www.HoldenCampbell.com)

**CASH / CDs / CHECKING / SAVINGS / MONEY MARKET**

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

**STOCKS/ BONDS/ MUTUAL FUNDS/ BROKERAGE ACCOUNTS / OTHER** (\*Insert retirement accounts on next page)

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

**IRA /401k / TSP / PENSION / OTHER RETIREMENT ACCOUNTS**

Company	Type of Account	Owner	Account Number	Beneficiary	Current Value
				Primary:	
				Alternate:	
				Primary:	
				Alternate:	
				Primary:	
				Alternate:	
				Primary:	
				Alternate:	
				Primary:	
				Alternate:	
				Primary:	
				Alternate:	

**REAL ESTATE**

Please try to bring a copy of your deed to our first meeting

Address	Owner(s)	Date Purchased	Basis	Approximate Value

**CLOSELY HELD BUSINESS INTERESTS**

Name and Form of Business	Owner(s)	Percent Owned	Basis/ Acquisition Date	Present Value

**LIFE INSURANCE**

Insurance Company	Policy Number	Owner / Insured	Beneficiary	Death Benefit
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	

**Annuities**

Insurance Company	Policy Number	Owner	Beneficiary	Value
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	
			Primary:	
			Alternate:	

**PERSONAL PROPERTY**

Household Furniture	Antiques	Jewelry	Other

Automobile: Year, Make, Model	Value	Owner

**MORTGAGES / DEBTS / OTHER OBLIGATIONS**

Borrower	Lender	Type of Debt	Outstanding Balance