

Other Dependents:

_____	____/____/____	_____
_____	____/____/____	_____

FINANCIAL INFORMATION

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership (Joint? Spouse?)</u>
I. Bank Accounts, CD's		
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

II. Stocks, Bonds, etc.		
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

III. Real Estate (including homestead)

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership</u>	<u>Indebtedness</u>
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

IV. Tangible Personal Property

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership (Joint? Spouse?)</u>
Furnishings	\$ _____	_____
Jewelry	\$ _____	_____
Automobiles	\$ _____	_____
Collections	\$ _____	_____
Other _____	\$ _____	_____

V. Annuities

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership</u>	<u>Beneficiary</u>
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

VI. IRA's

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership</u>	<u>Beneficiary</u>
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

VII. Retirement Plans (Pension, Profit-Sharing, 401(k), 457, etc.)

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership</u>	<u>Beneficiary</u>
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

VIII. Life Insurance

<u>Asset Description</u>	<u>Approx. Value</u>	<u>Ownership</u>	<u>Beneficiary</u>
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

IX. Businesses Owned

<u>Name of Business</u>	<u>Type of Entity (Corp./LLC/etc.)</u>	<u>% Owned</u>	<u>Approx. Value</u>
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

OTHER INFORMATION (to be answered by both spouses)

- 1) Do you have an existing Will or Trust? _____

- 2) What should happen to your assets upon your death assuming your spouse survives you?

- 3) What should happen to your assets upon your death in the event your spouse predeceases you?

- 4) Who should serve as guardian of your minor children upon your death? Also, please list an alternate. _____

- 5) Who do you want to administer your estate upon your death (follow directions in your Will, pay your debts, file your tax returns, distribute your assets)? Also, please list an alternate. _____

- 6) Who should handle your financial affairs if you become disabled or incapacitated? What is your appointee's address and phone #? Also, please list an alternate.

- 7) Who should make important medical treatment decisions on your behalf should you become incapacitated or disabled? What is your appointee's address and phone #? Also, please list an alternate.

- 8) Do you want to be placed on artificial devices designed to prolong your life should a doctor render an opinion that you have no chance of recovery? _____

- 9) Do you have any specific wishes regarding your funeral arrangements & the placement of your remains (burial/ cremation)?

