

## Financial Information

Place current value in the appropriate column to indicate form of ownership

<u>Assets</u>	<u>Joint</u>	<u>Husband</u>	<u>Wife</u>	<u>Other owners/ Beneficiaries</u>
<b>Non-Retirement</b>				
<i>Bank Accounts (including CDs)</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Securities (stocks, bonds, etc.) excluding IRAs and retirement plans.</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Loans receivable from others</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
<i>Closely held business interests</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Stock options and deferred compensation rights</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Real Estate (including personal residence)</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Automobiles</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>Other Assets (collections, household furnishings, etc.)</i>				
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Financial Information**

<u>Assets (con't)</u>	<u>Husband</u>	<u>Wife</u>	<u>Beneficiaries</u>	
<b>Retirement</b>				
<i>Individual Retirement Accounts (IRAs), 403(b), 401(k) Plans</i>				
_____	\$ _____	\$ _____	_____	
_____	_____	_____	_____	
_____	_____	_____	_____	
<i>Pension plans, profit sharing plans (please identify survivor benefits)</i>				
_____	\$ _____	\$ _____	_____	
_____	_____	_____	_____	
_____	_____	_____	_____	
<b>Accounts for Others</b>				
<i>College Savings Plans (please identify owner by listing value in appropriate column)</i>				
_____	\$ _____	\$ _____	_____	
_____	_____	_____	_____	
<i>Custodial Accounts (please identify custodian by listing value in appropriate column)</i>				
_____	\$ _____	\$ _____	_____	
_____	_____	_____	_____	
<b>Life Insurance</b>				
	<u>First Policy</u>	<u>Second Policy</u>	<u>Third Policy</u>	<u>Fourth Policy</u>
Policy Owner	_____	_____	_____	_____
Insured	_____	_____	_____	_____
Ins Co.	_____	_____	_____	_____
Policy Number	_____	_____	_____	_____
Face value	\$ _____	\$ _____	\$ _____	\$ _____
Type (term, whole, etc.)	_____	_____	_____	_____
Annual premium	\$ _____	\$ _____	\$ _____	\$ _____
Cash surrender value	\$ _____	\$ _____	\$ _____	\$ _____
Primary Beneficiary	_____	_____	_____	_____
Secondary Beneficiary	_____	_____	_____	_____
Outstanding loans	\$ _____	\$ _____	\$ _____	\$ _____
Comments	_____	_____	_____	_____
_____	_____	_____	_____	_____
<b>Mortgages and Liabilities</b>				
	<u>Joint</u>	<u>Husband</u>	<u>Wife</u>	
_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____