

Full Legal Name: _____	Date of Birth: _____
Address: _____	Place of Birth: _____
Phone Number: _____	Social Security Number: _____
State of Domicile: _____	Home of Record: _____

STATEMENT OF ASSETS

BANK ACCOUNTS		LIFE INSURANCE	
Bank or Financial Institution:		Type of Policy:	
Account Number:		Policy Number:	
Type of Account:		Insurance Agent:	
Name of Owner:		Location of Insurance Policy:	
Approximate Market Value:		Approximate Market Value:	
Approximate Current Value:		Approximate Current Value:	
Description:		Description:	
AUTOMOBILES		REAL ESTATE	
Make, Model, Year:		Location of Real Estate:	
Loan Amount:		How is it Owned:	
Load Holder Name and Address:		Date Purchased:	
Location of Title:		Tax Assessment Value:	
Liens on Title of Property?:	YES or NO	Liens on Title of Property?:	YES or NO
Approximate Market Value:		Approximate Market Value:	
Approximate Current Value:		Approximate Current Value:	
Description:		Description:	
STOCK AND BONDS		TITLED ASSETS	
Investment Broker:		Location of Asset:	
Type of Asset:		Name of Owner:	
Account or Serial Number:		Location of Title of Asset:	
Maturity Date:		Purchase Price of Asset:	
Approximate Market Value:		Approximate Market Value:	
Approximate Current Value:		Approximate Current Value:	
Description:		Description:	
PROFESSIONAL/BUSINESS		OTHER	
Type of Business:		Any other Property Not Listed:	
Type and Amount of Ownership:		Title of Property	
Business Contacts:		Approximate Market Value	
Share of Ownership Business:		Approximate Current Value	
Approximate Market Value			
Approximate Current Value		Description:	
Description:			