

ASSET ANALYSIS - MARRIED

Name:				As of:	
VALUE OF ASSETS OWNED, AND HOW TITLED					
	Husband	Wife	Joint Spouse with Survivorship	Husband's Trust	Wife's Trust
Checking Accounts					
Savings Accounts					
Money Market Accounts					
Cert's of Deposit					
U.S. Savings Bonds (Total)					

**Seen and correct
to the best of my knowledge**

Signature: _____

ASSET ANALYSIS - MARRIED

	Husband	Wife	Joint Spouse with Survivorship	Husband's Trust	Wife's Trust
Stocks & Bonds & Brokerage Acc'ts					
Mutual Funds					
Notes Receivable					
Annuities					
Business Interests					

Seen and correct
to the best of my knowledge

Signature: _____

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	Husband	Wife	Joint Spouse with Survivorship	Husband's Trust	Wife's Trust
Real Estate (estimate fair market value)					
Residence					
(Also note any mortgage)					
IRA/401(k)/Keogh/SEP					
Vehicle 1-					
Vehicle 2-					
Burial Arrangements					
Pers. Prop. of Unusual Value					
Other					
Death Benefit of Life Insurance					
Total					

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ASSET ANALYSIS - MARRIED

Gross Income per Year from last tax return	Husband if married filing separately	Wife if married filing separately	Married joint return		
Wages, salaries, tips					
Taxable interest					
Tax-exempt interest					
Ordinary dividends					
Qualified dividends					
Alimony received					
Business income or (loss)					
Capital gain					
Other gains or (losses)					
IRA distributions					
Pensions and annuities					
Rental real estate					
Royalties					
Farm income or (loss)					
Unemployment comp.					
Social Security benefits					
Other income					
TOTAL GROSS MONTHLY INCOME					

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ASSET ANALYSIS - MARRIED

Gifts given over last five years	Approximate date	Approximate value			
Debts Owed	Approx. amt.	Payoff sched.	Est. payoff date		

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to the best of my knowledge

Signature: _____