

**GUARDIANSHIP/CONSERVATORSHIP
ASSET ANALYSIS - SINGLE**

Name:				As of:
Name of Financial Institutions	Client	Joint with Survivorship	Other	Beneficiary Designations
Checking Accounts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Savings Accounts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Money Market Accounts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Cert's of Deposit	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
U.S. Savings Bonds (Total)				
	\$	\$	\$	
	\$	\$	\$	
Stocks & Bonds & Brokerage Acc'ts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Business Interests				
	\$	\$	\$	
	\$	\$	\$	
Notes Receivable				
	\$	\$	\$	
	\$	\$	\$	
Annuities				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	

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ASSET ANALYSIS - SINGLE**

	Client	Joint with Survivorship	Other	Beneficiary Designations
Real Estate including Timeshares (estimate fair market value)				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
(Also note any mortgage)	\$	\$	\$	
IRA/401(k)/Keogh/SEP				
	\$	N/A	N/A	
	\$	N/A	N/A	
Vehicle 1-	\$	\$	\$	
Vehicle 2-	\$	\$	\$	
Pers. Prop. of Unusual Value	\$	\$	\$	
Other	\$	\$	\$	
Death Benefit of Life Insurance				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
TOTAL	\$	\$	\$	
DEBTS OWED	Approx. amt.	Payoff sched.	Est. payoff date	
GROSS MONTHLY INCOME				
Wages/Salary	\$			
Social Security Retirement	\$			
Social Security Disability (SSDI)	\$			
Supplemental Security Income (SSI)	\$			
Civil Service Pension	\$			
Military Retirement	\$			
VA Disability	\$			
Other Pension	\$			
Annuity Income	\$			
Interest & Investment Income	\$			
Other	\$			
TOTAL INCOME	\$			