

**GUARDIANSHIP/CONSERVATORSHIP
ASSET ANALYSIS - MARRIED**

Name:					As of:
Name of Financial Institutions	Husband	Wife	Joint with Spouse	Joint with 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					
	\$	\$	\$	\$	
	\$	\$	\$	\$	

**GUARDIANSHIP/CONSERVATORSHIP
ASSET ANALYSIS - MARRIED**

	Husband	Wife	Joint with Spouse	Joint with Other	Beneficiary Designations
Notes Receivable					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
Annuities					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
Real Estate including Timeshares (Estimate fair market value)					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
(Also note any mortgage)	\$	\$	\$	\$	
IRA/401(k)/Keogh/SEP					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
Vehicle 1-	\$	\$	\$	\$	
Vehicle 2-	\$	\$	\$	\$	
Pers. Prop. of Unusual Value	\$	\$	\$	\$	
Other	\$	\$	\$	\$	
Death Benefit of Life Insurance					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
TOTAL	\$	\$	\$	\$	

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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	\$				