

| | | | | |
|---|-------------------------------------------|---------|------|-------|
| | NAME | | | |
| | Asset Statement | | | |
| | Values approximate as of _____ | | | |
| | | Husband | Wife | Joint |
| 1 | Cash Equivalents | | | |
| | 1.1 Name of Bank, Acct # | | | |
| | 1.2 Name of Bank, Acct # | | | |
| | | | | |
| 2 | Securities | | | |
| | 2.1 Name of Brokerage, Acct # | | | |
| | 2.2 Individual Securities, # of Shares | | | |
| | 2.3 Closely-Held Business Interest | | | |
| | 2.4 Bonds | | | |
| | | | | |
| 3 | Real Property | | | |
| | 3.1 Address | | | |
| | 3.2 Address | | | |
| | | | | |
| 4 | Tangible Personal Property | | | |
| | 4.1 Household goods and personal property | | | |
| | 4.2 Motor vehicles | | | |
| | | | | |
| 5 | Retirement Accounts | | | |
| | 5.1 Name, Acct # | | | |
| | 5.2 Name, Acct # | | | |
| | | | | |
| 6 | Life Insurance and Annuities | | | |
| | 6.1 Name, Policy # | | | |
| | 6.2 Name, Policy # | | | |
| | | | | |
| 7 | Liabilities | | | |
| | 7.1 | | | |
| | 7.2 | | | |
| | | | | |
| | Subtotal: | | | |
| | | | | |
| | Grand Total: | | | |
| | | | | |