

# THE THOMPSON LAW FIRM

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## Sample Asset Statement

NAME(S): \_\_\_\_\_

	<b>In whose name is the asset held?</b>		
	<b>Spouse #1</b>	<b>Spouse #2</b>	<b>Joint</b>
<b>1 REAL ESTATE</b>			
1.1 Residence: address			
1.2 Other property (describe): address			
<b>2 STOCKS, BONDS and OTHER SECURITIES</b>			
2.1 Name of brokerage; account number			
2.2 Individual securities: description; quantity held			
2.3 U.S. bonds, notes, bills: description; quantity held			
2.4 Partnership or closely held business interest			
2.5 Other securities (describe):			
<b>3 MORTGAGES, NOTES AND CASH</b>			
3.1 Checking: institution name; account number			
3.2 Savings: institution name; account number			
3.3 Money market: institution name; account number			
3.4 Credit union: institution name; account number			
3.5 Other: notes, mortgages owned, certificates of deposit, etc.			
<b>4 INSURANCE and ANNUITIES</b>			
4.1 Institution; beneficiary name(s); account or policy number			
4.2 Institution; beneficiary name(s); account or policy number			
<b>5 RETIREMENT ACCOUNTS</b>			
5.1 Type of account; account name; account number			
5.2 Type of account; account name; account number			
<b>6 TANGIBLE PERSONAL PROPERTY</b>			
6.1 Household Goods, Furnishings and Miscellaneous Personal Property			
6.2 Automobiles, boats, other vehicles (describe)			
6.3 Art/Coin/Stamp collections; precious metals; jewelry, etc.			
<b>7 LIABILITIES</b>			
7.1 Mortgages and notes payable			
7.2 Other debts (describe)			
<b>TOTALS</b>			