

Assets: Please provide a brief description of the assets you currently own:

	<u>Description</u>	<u>Value</u>	<u>Debt</u>
Real Estate:	_____		

Vehicles: _____

Bank Accts: _____

Safe Deposit: _____
401K/IRA/Pension _____

Stocks/Bonds/Mutual Funds: _____

Cert. Of Deposit: _____

Collections, Jewelry, Art _____

Life Insurance: _____

Trust: _____

Debts: List your estimated Unsecured Debt \$ _____

Advisors (accountant, insurance agent, investment advisor) _____

Husband's Relatives (identify father, mother, siblings) _____

Wife's Relatives (identify father, mother, siblings) _____

How did you hear of this office? _____