Personal Information

				Date			
Legal Name							
	First		Middle	Las	st		
Permanent Address							
			Phone Nu	mber		_	
ate of Birth Social Security No							
Marital Status □Sing	le $\square M$	Iarried	□Widowed	□Divorced			
Legal Name of Spouse (i	f married)						
		First		Middle	Last		
Permanent Address (if di	fferent from ab	ove)					
Date of Birth	Date of Birth Social Security No						
If divorced or widowed,	please list name	e and addres	ss of former spous	e:			
Title to Property							
Is title of any property o	wned by, or wi	th Former S	Spouse now in you	ur name only?	(Give necessar	ry details on back	
of this page.)							
Will							
Do you have a Will?	Yes 🗖	No 🗖	if so,	please attach a	copy.		
Children/Relations							
List names of children, p	re-deceased ch	ildren, any o	children by other i	narriages, child	dren of pre-dec	eased children. (If	
no children, please list pa	arents and/or br	others and s	sisters.)				
Name	Rela	ationship	Date of Birth	Address			

Assets/Liabilities

Personal Property

This includes personal effects, automobiles, boats, trailers, collections, household furniture, jewelry, etc. of major value or importance.

Description		Location
		Total Personal Property
Bank Accounts		
Account: In Husband's n In Wife's name Jointly (J)		
\$		
	Bank	Address
\$		
Savings Accounts	Bank	Address
\$		
	Bank	Address
\$		
	Bank	Address
CD's, IRA's		
¥	Bank	Address
\$		
	Bank	Address

Total Cash _____

BONDS, STOCKS, MORTGAGES, NOTES OR TRUST DEEDS:

In Husband's name only (H) In Wife's name only (W)			
Jointly (J)	Cost When Acquired	Current Value	Title Held
		Total Intangible	S
REAL ESTATE OWNED: Address	Value	Title	
	Total Rea	al Estate	
NOTES OR MORTGAGES OV	WING AGAINST YOUR ESTATI	E: Amoun	
		Φ.	
		\$	
	Total Indebted	dness \$	
INSURANCE POLICIES			
Your estate would receive your libeneficiary has been named.	fe insurance should your named ben	neficiary predecease	e you and no contingent
Company	Kind of Policy	Beneficiary	Amount
			\$ \$
			\$
			\$
		Total Insu	rance \$

RETIREMENT BENEFITS	
Please explain monthly income and death benefits.	
	Total \$
The approximate net value of (my) (our) estate is:	