

Property information

As with all confidential information, keep this document in a safe place.

Personal residence(s)

List income producing property under “Other Real Estate.”

Address	Purchase price	Name(s) of owner(s)	Purchase date	Current market value
	\$			\$
	\$			\$
	\$			\$

Personal residence mortgage(s)

Include home mortgage and all home equity loans.

Mortgage company name	Loan number	Name(s) of original owner(s)	Original amortization period (e.g., 30, 20, 15 yrs)	Payment amt/ frequency (e.g., weekly, monthly)	Outstanding principal amount
		%		\$ ____ / ____	\$
		%		\$ ____ / ____	\$
		%		\$ ____ / ____	\$

Other real estate

List income producing property.

Address	Name(s) of owner(s)	Purchase date	Current market value	Purchase price	Monthly rental income	Monthly rental expenses
			\$	\$	\$	\$
			\$	\$	\$	\$
			\$	\$	\$	\$

Other real estate mortgage(s)

Mortgage company name	Loan number	Name(s) of original owner(s)	State	Date	Interest rate	Original amortization period (e.g., 30, 20, 15 yrs)	Payment amt/ frequency (e.g., weekly, monthly)	Outstanding principal amount
					%		\$ ____ / ____	\$
					%		\$ ____ / ____	\$
					%		\$ ____ / ____	\$

Personal use assets

Auto, boats, etc. Include any related loans/liabilities under "Other Liabilities."

Address	Purchase price	Name(s) of owner(s)	Purchase date	Current market value
	\$			\$
	\$			\$
	\$			\$
	\$			\$
	\$			\$

Non-qualified assets

Asset type	Name of asset and financial institution	Account number	Owner name(s)	Approximate market value
Checking account I				\$
Checking account II				\$
Savings account I				\$
Savings account II				\$
Money market account				\$
CD				\$
Municipal bond				\$
Corporate bond/bond fund				\$
Government bond				\$
Equity mutual fund				\$

Asset type	Name of asset and financial institution	Account number	Owner name(s)	Approximate market value
Hybrid mutual fund				\$
Individual stock				\$
College savings I				\$
College savings II				\$
Health savings account				\$
Other				\$
Other				\$

Qualified retirement assets

IRA, Pension Plan, 401(k), 403(b), SIMPLE, SEP, others.

Financial institution and type (e.g., IRA, 401(k), other)	Account number	Name of owner	Beneficiary	Market value
				\$
				\$
				\$
				\$

Defined benefit retirement plans

Employer/Sponsor name	Name of employee participant	Projected annual income/ retirement age	Pension formula (% per year of service)	Market value
				\$
				\$
				\$
				\$

Nonqualified deferred annuities

Financial institution and product name	Contract number	Name(s) of owner(s)	Name of annuitant	Beneficiary	Purchase date	Current market value
						\$
						\$
						\$
						\$

Other liabilities (credit cards, bank loans, auto loans, student loans, etc.)

Purpose	Lending institution/VISA, Mastercard, etc.	Account number	Name(s) of owner(s)	Start date	Interest rate	Payment type and frequency (e.g., interest only, pl)	Payment amount	Outstanding principal amount
					%		\$	\$
					%		\$	\$
					%		\$	\$

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