

**FINANCIAL WORKSHEET**

*Please fill in with approximate values*

<b>ASSETS</b>	<b>JOINT TENANT</b>	<b>HUSBAND*</b>	<b>WIFE*</b>
Real Estate			
Bank Accounts, CD's and money market accounts			
IRA, 401(k), 403(b) etc.			
Brokerage			
Stocks			
Bonds			
Personal Property			
Car			
Boat/Airplane/Other			
Loans/Mortgages/Notes (payable to you)			
<b>Comments</b>			

*\* Identify if any assets are titled "Payable on Death" or "in Trust For"*

**Fein, Such, Kahn Shepard, PC 973-538-4700**

<b>LIABILITIES</b>	<b>JOINT TENANT</b>	<b>HUSBAND</b>	<b>WIFE</b>
Mortgage			
Home Equity			
Outstanding Loans <i>(auto, student)</i>			
Other debt <i>(credit card, bills, personal loans)</i>			

<b>INSURANCE</b>	<b>JOINT</b>	<b>HUSBAND</b>	<b>WIFE</b>
Carrier/Policy Number			
Death Benefit			
Group Term/Term/Whole Life/Variable			
Insured			
Owner			
Beneficiary			

**Comments**