

FINANCIAL WORKSHEET

Please fill in with approximate values

ASSETS*		LIABILITIES	
Real Estate		Mortgage	
Retirement Plan <i>(identify as IRA, 401(k), vested pension Deferred Comp. or other)</i>		Home Equity	
Bank Accounts <i>(including money market accounts)</i>		Outstanding Loans <i>(auto, student)</i>	
CD		Other debt <i>(credit cards, bills, personal loans)</i>	
Brokerage			
Stocks		INSURANCE	
		Carrier/Policy Number	
Bonds		Death Benefit	
Personal Property		Group Term/Term/Whole Life/Variable	
Car		Insured	
Boat/Airplane/Other		Owner	
Loans/Mortgages/Notes <i>(payable to you)</i>		Beneficiary	
Comments		Comments	

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