

## SCHEDULE OF ESTIMATED ASSETS (Both Spouses)

Husband's Name: \_\_\_\_\_ Age: \_\_\_\_\_ Tel: \_\_\_\_\_

Wife's Name: \_\_\_\_\_ Age: \_\_\_\_\_

Number (and ages) of Children: \_\_\_\_\_

If children married, list Spouses and Grandchildren on separate sheet

Asset	Value of Asset in Husband's Name	Value of Asset in Wife's Name	Value of Asset in Joint Name
Cash and Cash Equivalents			
Stocks, Bonds, Securities, Mutual Funds, Brokerage Accounts			
Business Real Estate			
Residential Real Estate (including vacation homes)			
Business Interests			
Qualified Retirement Plans; IRA; 403(b)			
Personal Tangible Property			
Life Insurance (attach copies of face page and cash surrender value page)			
Other Assets			
<b>TOTAL ASSETS</b>			
Liabilities; Risk issues, Etc.			