

APPENDIX B
Asset Form*

NAMES: _____

ADDRESS: _____

DATE: _____

	Husband	Wife	Joint
Assets:	_____	_____	_____
Residences	_____	_____	_____
Other Real Estate	_____	_____	_____
Stocks	_____	_____	_____
Bonds	_____	_____	_____
Cash	_____	_____	_____
Mortgages	_____	_____	_____
Insurance (Face)	_____	_____	_____
Tangibles	_____	_____	_____
Retirement Plans (Death Benefit)	_____	_____	_____
Trust Interests	_____	_____	_____
Others	_____	_____	_____
Totals	_____	_____	_____
Debts:	_____	_____	_____
Mortgages	_____	_____	_____
Others	_____	_____	_____
Totals	_____	_____	_____

* For purposes of this form, ballpark values for the general asset categories are sufficient. Any necessary detail can be developed at the meeting.