

7. List all life insurance policies:

<u>Company</u>	<u>Type</u>	<u>Face Value/Cash Value</u>	<u>Beneficiary</u> <u>1st and 2nd</u>
_____	_____	_____	_____
_____	_____	_____	_____

8. List bank accounts, CDs and money market funds (individual and joint):

<u>Bank/Institution</u>	<u>Type of Account</u>	<u>Approx. Bal.</u>	<u>Name of Owners</u>
_____	_____	_____	_____
_____	_____	_____	_____

9. List all real estate (individual and joint):

<u>Brief Description</u>	<u>Value</u>	<u>Mortgage Balance</u>	<u>Name of Owners</u>
_____	_____	_____	_____
_____	_____	_____	_____

10. List all retirement plans, IRAs, 401-Ks, etc.: _____

11. Stocks, bonds, mutual funds and annuities (individual and joint):

<u>No. of Shares</u>	<u>Class</u>	<u>Company</u>	<u>Value</u>	<u>Name of Owners</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

12. List any other property you own or in which you have an interest, including business interests, notes or mortgages owed to you, autos, boats, valuable jewelry, art work, etc.

13. Are you or any of your relatives disabled? _____

14. List the company name and benefit amount of any Long Term Care Insurance: _____

15. List all gifts of property and money over the past five years: _____

16. Do you have a prepaid funeral account? _____

17. List the sources and amounts of all income, including SS and pensions: _____

18. Have you or your spouse served in the military during a war? _____.