



Meeting Signing	g Date: Date:						
BASIC	PERSONAL	INFORMATIO	N				
			Husband			Wife	
Full Legal Name			110350110			******	
Home Address Street		Street City/State/Zip					
Telephone Telephone							
County of Residence							
Occupation							
Emplo	yer						
Email Address							
Date of Birth							
Date of Marriage							
Are yo	u a US Citizen?	?					
CHILD	REN						
		Full	Name		/ Hers / Ours	Date of Birth / Age	
1.							
2.							
3.							
4.	4.						
				I	I		
ADDITIONAL INFORMATION							
					band	Wife	
Do vou	have an expect	ancy to inherit a	substantial sum of money?			***************************************	
Do you have any personal loans payable to you?							
			m a previous marriage?				

ASSET INVENTORY - HUSBAND - COMPLETE WITH ACCOUNT NUMBERS AND EXACT AMOUNTS

Annual Income	
FMV of Primary Residence	
Mortgage	
FMV of Other Real Estate Properties	
Mortgage	
Location Address	
Personal Belongings: The contents of your house.	
Antiques, jewelry, coins, guns (not included above)	
Automobiles (include year, make, and model)	
Cash, Savings Accounts, CDs	
Stocks and Bonds (not in a Retirement Account)	
Pension/401K/IRA	
Beneficiary:	
Annuities	
Beneficiary:	
Life Insurance	
Beneficiary:	
FMV of Business Type of Entity:	
Any other assets not listed above:	
TOTAL GROSS ESTATE	
Other Debts (credit cards, auto loans, etc.)	
NET WORTH	

ASSET INVENTORY - WIFE - COMPLETE WITH ACCOUNT NUMBERS AND EXACT AMOUNTS

Annual Income				
FMV of Primary Residence				
Mortgage				
FMV of Other Real Estate Properties				
Mortgage				
Location Address				
Personal Belongings: The contents of your house.				
Antiques, jewelry, coins, guns (not included above)				
Automobiles (include year, make, and model)				
Cash, Savings Accounts, CDs				
Stocks and Bonds (not in a Retirement Account)				
Pension/401K/IRA				
Beneficiary:				
Annuities				
Beneficiary:				
Life Insurance				
Beneficiary:				
FMV of Business Type of Entity:				
Any other assets not listed above:				
TOTAL GROSS ESTATE				
Other Debts (credit cards, auto loans, etc.)				
NET WORTH				
I have completed the above form and certify that to the best of my knowledge the information provided above is true and correct.				

____ Client