

ASSET INFORMATION

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

1. Do you own your current residence? If so, please state the following:

Address: \_\_\_\_\_  
\_\_\_\_\_

Date purchased: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Down payment: \_\_\_\_\_

Mortgage Company: \_\_\_\_\_

Balance due: \_\_\_\_\_

Second Mortgage: \_\_\_\_\_

Balance due: \_\_\_\_\_

2. Do you have any additional real estate? If so, please state the following for each:

Address: \_\_\_\_\_  
\_\_\_\_\_

Date purchased: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

Down payment: \_\_\_\_\_

Mortgage Company: \_\_\_\_\_

Balance due: \_\_\_\_\_

Second Mortgage: \_\_\_\_\_

Balance due: \_\_\_\_\_

3. Do you own vehicles, if so, please list:

Make:\_\_\_\_\_ Model:\_\_\_\_\_ Year:\_\_\_\_\_ Who drives this vehicle?\_\_\_\_\_

Make:\_\_\_\_\_ Model:\_\_\_\_\_ Year:\_\_\_\_\_ Who drives this vehicle?\_\_\_\_\_

Make:\_\_\_\_\_ Model:\_\_\_\_\_ Year:\_\_\_\_\_ Who drives this vehicle?\_\_\_\_\_

4. Bank accounts:

Bank:\_\_\_\_\_ Savings/Checking/Money Market?\_\_\_\_\_

Average balance:\_\_\_\_\_

Bank:\_\_\_\_\_ Savings/Checking/Money Market?\_\_\_\_\_

Average balance:\_\_\_\_\_

Bank:\_\_\_\_\_ Savings/Checking/Money Market?\_\_\_\_\_

Average balance:\_\_\_\_\_

5. Investment/Stocks/IRAs/401k/Pension Plans: Please list each account and current balance:

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6. Please list the name, address and phone number of any accountant used by

6. Please list any and all boats, trailers, campers, motorcycles or other form of recreational vehicle.

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7. Please list any and all assets not previously listed.

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