

ASSETS AND INCOME

Assets	Husband	Wife	Held Jointly?
Cash Accounts			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Investment Accounts			
	\$	\$	
	\$	\$	
	\$	\$	
Stocks			
	\$	\$	
	\$	\$	
	\$	\$	
Automobiles (equity)			List any loans below
	\$	\$	
	\$	\$	
	\$	\$	
Retirement Accounts (IRAs)			Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
Pension Plans (401(k), etc.)			Designate beneficiary below
	\$	\$	
	\$	\$	

Life Insurance Policies	Husband	Wife	Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Annuities			Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
Bonds			
	\$	\$	
	\$	\$	
Monies Owed to You			
	\$	\$	
Residence (equity)			List mortgages below
	\$	\$	
	\$	\$	
Other Real Estate (equity)			List mortgages below
	\$	\$	
	\$	\$	
Business Interests			
	\$	\$	
	\$	\$	
Anticipated Inheritance, Gift			
	\$	\$	
	\$	\$	

Pre-paid Funeral/Burial Costs/Plots	Husband	Wife	
	\$	\$	
	\$	\$	
Other Assets			
	\$	\$	
	\$	\$	
	\$	\$	
TOTAL:	\$	\$	

Income	Husband	Wife
Social Security	\$	\$
IRA Distributions	\$	\$
Withdrawal from Retirement Fund	\$	\$
Gifts or Inheritances	\$	\$
Waived Income	\$	\$
Gains from Gambling	\$	\$
Income from Joint Bank Accounts	\$	\$
Wages	\$	\$
Other Income	\$	\$
TOTAL:		