Agnew Law Office, P.C.

A Family Estate Planning Law Firm

ESTATE PLANNING FINANCIAL INFORMATION

CONFIDENTIAL
COVERED BY ATTORNEY-CLIENT PRIVILEGE

General Estimates of Values are Sufficient
Precise Values and Account Numbers are NOT Required

Client Name:

	VALUE	OWNED BY	
Bank Accounts			
Checking	$________________	❑ Self	❑ Joint with __________
Savings	$________________	❑ Self	❑ Joint with __________
CDs	$________________	❑ Self	❑ Joint with __________
Money Market	$________________	❑ Self	❑ Joint with __________

Investment Assets [Non-IRA or 401(k) Accounts- see next page for those]

Mutual Funds	$________________	❑ Self	❑ Joint with __________
Stocks	$________________	❑ Self	❑ Joint with __________
Bonds	$________________	❑ Self	❑ Joint with __________
______________	$________________	❑ Self	❑ Joint with __________

Real Estate

Residence	$________________	❑ Self	❑ Joint with __________
Vacation	$________________	❑ Self	❑ Joint with __________
Commercial	$________________	❑ Self	❑ Joint with __________

Retirement Accounts

IRAs	$__________________	❑ Self	
IRAs	$__________________	❑ Self	
401(k)	$__________________	❑ Self	
401(k)	$__________________	❑ Self	
403(b)	$__________________	❑ Self	
Roth IRA	$__________________	❑ Self	
______________	$__________________	❑ Self	

Annuities

Annuity	$__________________	❑ Self	❑ Joint with ____________
Annuity	$__________________	❑ Self	❑ Joint with ____________

Life Insurance (Death Benefit)

Permanent	$__________________	❑ Self	❑ Joint with ____________
Permanent	$__________________	❑ Self	❑ Joint with ____________
Term	$__________________	❑ Self	❑ Joint with ____________
Term	$__________________	❑ Self	❑ Joint with ____________

Business Assets

LLC	$__________________	❑ Self	❑ Joint with ____________
LLC	$__________________	❑ Self	❑ Joint with ____________
Corporation	$__________________	❑ Self	❑ Joint with ____________
Corporation	$__________________	❑ Self	❑ Joint with ____________
Partnership	$__________________	❑ Self	❑ Joint with ____________
______________	$__________________	❑ Self	❑ Joint with ____________

Stuff That Doesn't Fit Anywhere Else

______________	$__________________	❑ Self	❑ Joint with ____________
______________	$__________________	❑ Self	❑ Joint with ____________

Name of Financial Advisor: *(If Any)* ____________________________________