
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:

	<u>VALUE</u>	<u>OWNED BY</u>		
Bank Accounts				
Checking	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Savings	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
CDs	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Money Market	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

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

Mutual Funds	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Stocks	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Bonds	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
_____	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

Real Estate

Residence	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Vacation	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Commercial	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

Retirement Accounts

IRAs	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife
IRAs	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife
401(k)	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife
401(k)	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife
403(b)	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife
Roth IRA	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife
_____	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife

Annuities

Annuity	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Annuity	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

Life Insurance (Death Benefit)

Permanent	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Permanent	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Term	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Term	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

Miscellaneous

Vehicle	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Vehicle	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Jewelry	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
Furniture	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
_____	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
_____	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

Stuff That Doesn't Fit Anywhere Else

_____	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint
_____	\$ _____	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Joint

Name of Financial Advisor: (If Any) _____