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# Agnew Law Office, P.C.

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*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	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Savings	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
CDs	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Money Market	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____

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

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

**Real Estate**

Residence	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Vacation	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Commercial	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____

**Retirement Accounts**

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

**Annuities**

Annuity	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Annuity	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____

**Life Insurance (Death Benefit)**

Permanent	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Permanent	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Term	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Term	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____

**Miscellaneous**

Vehicle	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Vehicle	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Jewelry	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
Furniture	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
_____	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
_____	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____

**Stuff That Doesn't Fit Anywhere Else**

_____	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____
_____	\$ _____	<input type="checkbox"/> Self	<input type="checkbox"/> Joint with _____

**Name of Financial Advisor: (If Any)** \_\_\_\_\_