

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 | \$ _____ | <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 |

Business Assets

| | | | | |
|-------------|----------|----------------------------------|-------------------------------|--------------------------------|
| LLC | \$ _____ | <input type="checkbox"/> Husband | <input type="checkbox"/> Wife | <input type="checkbox"/> Joint |
| LLC | \$ _____ | <input type="checkbox"/> Husband | <input type="checkbox"/> Wife | <input type="checkbox"/> Joint |
| Corporation | \$ _____ | <input type="checkbox"/> Husband | <input type="checkbox"/> Wife | <input type="checkbox"/> Joint |
| Corporation | \$ _____ | <input type="checkbox"/> Husband | <input type="checkbox"/> Wife | <input type="checkbox"/> Joint |
| Partnership | \$ _____ | <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) _____