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Confidential Financial Statement

Name: _____ Date _____

Address: _____ Phone # _____

County: _____ Phone # _____

Checking Accounts ATTACH A CURRENT STATEMENT	
Bank or Savings Institution	Average Balance
1.	\$
2.	\$
3.	\$

Savings Accounts ATTACH A CURRENT STATEMENT	
Bank or Savings Institution	Average Balance
1.	\$
2.	\$
3.	\$

Certificates of Deposits ATTACH A CURRENT STATEMENT	
Bank or Savings Institution	Current Value
1.	\$
2.	\$
3.	\$

Retirement Accounts (IRA, Pension, Keogh, 401(k), etc.) ATTACH A CURRENT STATEMENT		
Name of Bank or Company	Average Balance	
1.	\$	Held in Name of:
		Beneficiary:
2.	\$	Held in Name of:
		Beneficiary:
3.	\$	Held in Name of:
		Beneficiary:
4.	\$	Held in Name of:
		Beneficiary:
5.	\$	Held in Name of:
		Beneficiary:

Money Market Accounts / Annuities/ Other Accounts ATTACH A CURRENT STATEMENT		
Name of Company	Average Balance	Held in Name of:
1.	\$	
2.	\$	
3.	\$	

Do you have a Safety Deposit Box? Yes No Box# _____

Location: _____ Who has a key? _____

Interest in Real Property (House, Land, etc.) ATTACH COPY OF DEED(S) or other documents showing transfer of title.			
Address of Property (or legal description)	Date Acquired	Cost / Basis	Fair Market Value
1.			\$
2.			\$
3.			\$

Minerals, Oil, and Gas Lease, Etc. ATTACH COPY OF MINERAL DEED(S), final accounting of probate or other documents showing transfer of title			
Minerals, oil/gas leases, etc.	Date Acquired	Cost Basis	Fair Market Value
1.			\$
2.			\$

Individual Stocks and Bonds ATTACH ORIGINAL STOCKS AND BONDS		
Company or Stockbroker	Number of Shares	Approximate Value
1.		\$
2.		\$
3.		\$

Life Insurance				
ATTACH A COPY OF THE POLICY OR STATEMENT				
Company	Insured	Beneficiary	Face Amount	Cash Value
1.				
2.				
3.				
4.				
5.				

Business Interest (Corporation, L.L.C. , Farm, Etc.)	
ATTACH ORIGINAL STOCK CERTIFICATES	
Name of Company	Value
1.	\$
2.	\$
3.	\$

Personal Property		
	Brief Description	Approx. Value
Present value of clothing and jewelry		\$
Present value of household furnishings		\$
Present value of collections (i.e., coins, stamps, guns, ect.)		\$

Vehicles LOCATE ORIGINAL TITLES		
Year	Make/Model	Approx. Value
1.		\$
2.		\$
3.		\$
4.		\$

Liabilities	
Name of Payee & Type of Debt	Approx. Balance
1.	\$
2.	\$
3.	\$
4.	\$
5.	\$
6.	\$

Other Assets	
Description	Approx. Value
1.	\$
2.	\$
3.	\$
4.	\$