

**FINANCIAL DATA
OF**

(Name)

Date

- Attach copies of records of assets and liabilities.
- If none in any category, write "none."
- Indicate in each category the total value from additional sheets attached.

A. Assets: Description Approximate Value

1. IRA's and other retirement plans (type, name and telephone # of contact person)

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2. Cash accounts (type, institution, account #, and name(s) on account)

3. Real estate (location, cost, year acquired, name(s) on deed, lien, % you own)

Residence (if owned):	

4. Stocks, bonds, mutual funds (ownership, institution, cost, year acq'd, exchange)

5. Closely held business interests (ownership, nature, cost, year acquired, buy/sell)

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6. Notes and loans receivable (name and address of debtor, original principal amount, interest rate, term, description of collateral and balance)

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7. Household inventory, including autos, boats, airplanes, etc.

Total from attached schedule	
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8. Life insurance you own (insured, carrier, policy #, face amount, year issued) Cash Value

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9. Other assets, including annuities, life estates, ownership interests in trusts, etc.

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TOTAL VALUE OF ASSETS	\$
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