

REAL PROPERTY PRESENTLY OWNED

1. PROPERTY #1:

a. ADDRESS:

b. DESCRIPTION OF PROPERTY (RESIDENCE, COMMERCIAL, UNDEVELOPED, OTHER)

c. ORIGINAL COSTS:

d. WHEN PURCHASED:

e. ESTIMATED PRESENT VALUE:

f. OUTSTANDING LOAN AMOUNT:

g. LENDOR/MORTGAGE HOLDER:

h. HOW IS PROPERTY TITLED:

i. AMOUNT OF DOWN PAYMENT:

j. SOURCE OF FUNDS FOR DOWN PAYMENT:

k. WHERE ARE THE DEEDS AND OTHER DOCUMENTS PROVING ALL OF THE ABOVE (PROVIDE THEM IF POSSIBLE)?

1. PROPERTY #2:

a. ADDRESS:

b. DESCRIPTION OF PROPERTY (RESIDENCE, COMMERCIAL, UNDEVELOPED, OTHER)

c. ORIGINAL COSTS:

d. WHEN PURCHASED:

e. ESTIMATED PRESENT VALUE:

f. OUTSTANDING LOAN AMOUNT:

g. LENDOR/MORTGAGE HOLDER:

h. HOW IS PROPERTY TITLED:

i. AMOUNT OF DOWN PAYMENT:

j. SOURCE OF FUNDS FOR DOWN PAYMENT:

k. WHERE ARE THE DEEDS AND OTHER DOCUMENTS PROVING ALL OF THE ABOVE (PROVIDE THEM IF POSSIBLE)?

MOTOR VEHICLES

AUTOMOBILE NO. 1

a. YEAR, MAKE MODEL:

b. HOW TITLED:

c. PURCHASE DATE:

d. SOURCE OF PURCHASE FUNDS:

f. PRESENT DEBT:

g. EQUITY:

h. HOLDER OF LIEN:

i. MONTHLY NOTE:

j. PRIMARY DRIVER:

MOTOR VEHICLES

AUTOMOBILE NO. 2

a. YEAR, MAKE MODEL:

b. HOW TITLED:

c. PURCHASE DATE:

d. SOURCE OF PURCHASE FUNDS:

f. PRESENT DEBT:

g. EQUITY:

h. HOLDER OF LIEN:

i. MONTHLY NOTE:

j. PRIMARY DRIVER:

PRESENT BANK ACCOUNTS

(INCLUDE CHECKING, MONEY MARKET, SAVINGS AND CREDIT UNION  
ACCOUNTS)

ACCOUNT #1:

a. NAME AND ADDRESS OF BANK OR SAVINGS INSTITUTION:

b. TYPE OF ACCOUNT:

c. ACCOUNT NUMBER:

d. PRESENT BALANCE:

e. NAME(S) ON ACCOUNT:

f. LENGTH OF TIME ACCOUNT HAS BEEN OPENED:

g. DESCRIBE SOURCE OF FUNDS THAT ARE DEPOSITED INTO THIS  
ACCOUNT:

ACCOUNT #2:

a. NAME AND ADDRESS OF BANK OR SAVINGS INSTITUTION:

b. TYPE OF ACCOUNT:

c. ACCOUNT NUMBER:

d. PRESENT BALANCE:

e. NAME(S) ON ACCOUNT:

f. LENGTH OF TIME ACCOUNT HAS BEEN OPENED:

g. DESCRIBE SOURCE OF FUNDS THAT ARE DEPOSITED INTO THIS ACCOUNT:

ACCOUNT #3:

a. NAME AND ADDRESS OF BANK OR SAVINGS INSTITUTION:

b. TYPE OF ACCOUNT:

c. ACCOUNT NUMBER:

d. PRESENT BALANCE:

e. NAME(S) ON ACCOUNT:

f. LENGTH OF TIME ACCOUNT HAS BEEN OPENED:

g. DESCRIBE SOURCE OF FUNDS THAT ARE DEPOSITED INTO THIS ACCOUNT:

ACCOUNT #4:

a. NAME AND ADDRESS OF BANK OR SAVINGS INSTITUTION:

b. TYPE OF ACCOUNT:

c. ACCOUNT NUMBER:

d. PRESENT BALANCE:

e. NAME(S) ON ACCOUNT:

f. LENGTH OF TIME ACCOUNT HAS BEEN OPENED:

g. DESCRIBE SOURCE OF FUNDS THAT ARE DEPOSITED INTO THIS ACCOUNT:



RETIREMENT ACCOUNTS

(INCLUDE IRA, PENSION, 401-K, PROFIT SHARING ANNUITY, DEFERRED  
COMP.)

TYPE OF ACCOUNT #1:

a. HOW FUNDED:

b. FUNDED BY WHOM:

c. WHEN OPENED:

d. AMOUNT VESTED:

e. PRESENT AMOUNT IN ACCOUNT:

f. NAME AND ADDRESS OF PLAN TRUSTEE:

g. NAME OF PARTY ACCOUNT IS IN:

h. WHO HAS THE DOCUMENTS EXPLAINING THE PLAN AND BENEFITS:

TYPE OF ACCOUNT #2:

a. HOW FUNDED:

b. FUNDED BY WHOM:

c. WHEN OPENED:

d. AMOUNT VESTED:

e. PRESENT AMOUNT IN ACCOUNT:

f. NAME AND ADDRESS OF PLAN TRUSTEE:

g. NAME OF PARTY ACCOUNT IS IN:

h. WHO HAS THE DOCUMENTS EXPLAINING THE PLAN AND BENEFITS:

CERTIFICATE OF DEPOSITS

CERTIFICATE OF DEPOSITS #1:

a. NAME AND ADDRESS OF BANK:

b. ACCOUNT OR CERTIFICATE OF DEPOSIT NUMBER:

c. PURCHASE PRICE OF CERTIFICATE OF DEPOSIT:

d. PURCHASE DATE:

e. MATURITY DATE:

f. INTEREST RATE:

g. VALUE OF MATURITY:

h. SOURCE OF FUNDS USED TO PURCHASE CERTIFICATE OF DEPOSIT:

CERTIFICATE OF DEPOSITS #2:

a. NAME AND ADDRESS OF BANK:

b. ACCOUNT OR CERTIFICATE OF DEPOSIT NUMBER:

c. PURCHASE PRICE OF CERTIFICATE OF DEPOSIT:

d. PURCHASE DATE:

e. MATURITY DATE:

f. INTEREST RATE:

g. VALUE OF MATURITY:

h. SOURCE OF FUNDS USED TO PURCHASE CERTIFICATE OF DEPOSIT:

STOCK AND BONDS

NAME OF SECURITY # 1:

NUMBER OF SHARES OR FACE VALUE:

WHEN PURCHASED:

IF A BOND, MATURITY DATE:

IF A BOND OR PREFERRED STOCK, PROVIDE INTEREST RATE:

SOURCE OF FUNDS USED TO PURCHASE:

NAME ON SECURITY:

ESTIMATED PRESENT VALUE:

STOCK OPTIONS:

NAME OF SECURITY # 2:

NUMBER OF SHARES OR FACE VALUE:

WHEN PURCHASED:

IF A BOND, MATURITY DATE:

IF A BOND OR PREFERRED STOCK, PROVIDE INTEREST RATE:

SOURCE OF FUNDS USED TO PURCHASE:

NAME ON SECURITY:

ESTIMATED PRESENT VALUE:

STOCK OPTIONS:

LIFE INSURANCE

POLICY # 1:

NAME OF COMPANY:

POLICY NUMBER:

TERM OR WHOLE LIFE:

NAME OF INSURED

NAME OF BENEFICIARY:

POLICY FACE AMOUNT:

CASH VALUE:

DATE OF POLICY:

PREMIUM SCHEDULE (MONTHLY, QUARTERLY, ETC.):

AMOUNT OF EACH PREMIUM AND WHO PAYS PREMIUM:

POLICY # 2:

NAME OF COMPANY:

POLICY NUMBER:

TERM OR WHOLE LIFE:

NAME OF INSURED

NAME OF BENEFICIARY:

POLICY FACE AMOUNT:

CASH VALUE:

DATE OF POLICY:

PREMIUM SCHEDULE (MONTHLY, QUARTERLY, ETC.):

AMOUNT OF EACH PREMIUM AND WHO PAYS PREMIUM:



PERSONAL PROPERTY OF SIGNIFICANCE

(Include any items of significant value that are either marital or separate, such as furniture, jewelry, gifts, stating its value, whether you received it during the marriage or before and if it was a gift.)

ITEM # 1:

DESCRIPTION:

VALUE:

HOW WAS IT ACQUIRED:

SOURCE OF FUNDS, IF PURCHASED DURING THE MARIAGE:

DONOR, IF GIFT WAS BY INHERITANCE:

ITEM # 2:

DESCRIPTION:

VALUE:

HOW WAS IT ACQUIRED:

SOURCE OF FUNDS, IF PURCHASED DURING THE MARIAGE:

DONOR, IF GIFT WAS BY INHERITANCE:

ITEM # 3:

DESCRIPTION:

VALUE:

HOW WAS IT ACQUIRED:

SOURCE OF FUNDS, IF PURCHASED DURING THE MARIAGE:

DONOR, IF GIFT WAS BY INHERITANCE:

ITEM # 4:

DESCRIPTION:

VALUE:

HOW WAS IT ACQUIRED:

SOURCE OF FUNDS, IF PURCHASED DURING THE MARIAGE:

DONOR, IF GIFT WAS BY INHERITANCE:

ITEM # 5:

DESCRIPTION:

VALUE:

HOW WAS IT ACQUIRED:

SOURCE OF FUNDS, IF PURCHASED DURING THE MARIAGE:

DONOR, IF GIFT WAS BY INHERITANCE:

ITEM # 6:

DESCRIPTION:

VALUE:

HOW WAS IT ACQUIRED:

SOURCE OF FUNDS, IF PURCHASED DURING THE MARIAGE:

DONOR, IF GIFT WAS BY INHERITANCE: