

## Financial Summary

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### Current Fair Market Value in Dollars

#### Assets

	Husband	Wife	Joint
Assets and Accounts			
Personal Residence			
Other Real Estate			
Cash and Bank Accounts			
Stocks			
Non-Qualified Investments			
Non-Qualified Annuities			
Qualified Annuities			
Qualified Retirement Plans			
Pension Plans			
Life Insurance Policies - cash value and death benefit			
Bonds			
Personal Property			
Monies Owed to You			
Partnership and LLC Interests			
Corporate Business - entity type _____			
Anticipated Inheritance, Gifts, Judgments			
Other Assets			
<b>Total Assets</b>	\$ -	\$ -	\$ -

#### Liabilities

Real Estate Mortgages Payable			
Loans Payable			
Accounts Payable			
Loans against Life Insurance			
Unpaid Taxes			
Anticipated Judgments Payable			
Other Liabilities			
<b>Total Liabilities</b>	\$ -	\$ -	\$ -

<b>Net Values</b>	\$ -	\$ -	\$ -
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<b>Summary Net Estate Value</b>	<b>\$ -</b>
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#### Monthly Income

Salary and Wages			
Investment Income and Dividends			
Social Security / Disability Income			
Pension and Retirement (do not include RMD's)			
Other Income			
<b>Total Monthly Income</b>	\$ -	\$ -	\$ -