

Bonds

Description (Issuer Series, Rate, Date Acquired)	Registration of Bonds (Form and Names)	Face Amount	Cost or Other Basis	Current Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Total _____

Bond Total _____

Stocks

Name of Company and Type of Stock _____

Number of Shares _____

Registration of Stock
(Form and Names) _____

Date Acquired _____

Cost or Other Basis _____

Current Value _____

INSURANCE

Type of Insurance	Name of Company	Policy Number	Expiration Dates	Name of Broker
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

LIFE INSURANCE

List all policies under which you are the insured.

1	Name of Company	Type of Policy	Policy Number	Present		Owner	How will Proceeds Be Paid		Beneficiary
				Cash Value	Face Amount				

TOTALS

EMPLOYEE AND RETIREMENT BENEFITS

Employers Pension, Profit-sharing or Stock Bonus Plans

	Plan 1	Plan 2	Plan 3
Name of Plan			
Trustee, Insurance Company, or Administrator			

Amount Contributed by Employee	_____	_____	_____
Amount Contributed by Employer	_____	_____	_____
Retirement Benefit	_____	_____	_____
Death Benefit	_____	_____	_____
Present Value of Total Contributions	_____	_____	_____
Amount Vested	_____	_____	_____

GROUP LIFE, ACCIDENT, HEALTH, DEATH BENEFIT, AND DISABILITY PLANS

	Plan 1	Plan 2	Plan 3
Name of Plan	_____	_____	_____
Insurer of Trustee	_____	_____	_____
Policy Number	_____	_____	_____
Benefits	_____	_____	_____
Beneficiary	_____	_____	_____
Options Elected	_____	_____	_____

SPLIT-DOLLAR LIFE INSURANCE

Enter here all information relating to split-dollar life insurance, e.g., name of company, policy number, form of agreement, face amount, net amount payable to beneficiary.

(and others) _____

Stocks _____

Non business receivables _____

Life Insurance on your life _____

Life insurance on lives of others _____

Business interests _____

Death benefits — Employee and Retirement plans _____

Rights under estates and trusts including powers
of appointment _____

Miscellaneous assets _____

ESTIMATED GROSS TOTAL _____