

NAME

EIN: _____

husband	SSN	DOB	age	Retired
wife	SSN	DOB	age	Retired

	Acct #	Value	Current Owner	Planned Owner	Current BD	Planned BD	Notes	Complete
REAL ESTATE								
Total:		\$0						

LIQUID ASSETS								
Total:		\$0						

NAME

	Acct #	Value	Current Owner	Planned Owner	Current BD	Planned BD	Notes	Complete
QUALIFIED ACCOUNTS (IRA, ROTH, 401K, ETC)								
Total:		\$0						

[illegible]

NAME

	Acct #	Value	Current Owner	Planned Owner	Current BD	Planned BD	Notes	Complete
LIFE INSURANCE								
Total:		\$0						
FUNERAL BURIAL TRUST								
Total:		\$0						
Total Assets								
Liabilities:								
NET WORTH:								
		\$0						
		\$0						

NAME

	Acct #	Value	Current Owner	Planned Owner	Current BD	Planned BD	Notes	Complete
INCOME - Monthly								
Social Security								
RMD								
Social Security								
Divs/Interst								
Total:		\$0						