

**FINANCIAL STATEMENT  
Individual**

**Assets**

<u>Asset</u>	How Title Held (H, W, Both)	When & How <u>Acquired</u>	Value ( <u>Less Any Mortgage</u> )
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Home:

Other Real Estate  
(address/location, type):

Securities:

Cash, C.D.'s, Other Bank/  
Money Market Accounts:

Collectibles and Antiques:

Personal Property, Autos, etc.:

Other Investments (describe):

Have you received any significant gifts or inheritances? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If so, indicate what value or what property was received, by whom, and when.

Do you anticipate any substantial gifts or inheritance? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If so, from whom and in what amount?



**Present Employer**

Husband:

Annual Income:

Do you have an existing marital property (or prenuptial or postnuptial) agreement?  
\_\_\_\_\_ Yes \_\_\_\_\_ No (If so, please provide a copy.)

**Debts**

(Other than mortgages shown above in connection with assets)

<u>To Whom Payable</u>	<u>Who Is Liable?</u> (H, W, Both)	<u>Is Debt Secured by</u> <u>Lien? On What Property?</u>	<u>Amount</u>
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**Other Assets, Liabilities or Debts not listed above**