

PRIMARY RESIDENCE			
Fair market value	\$	Monthly payment	\$
Amount left on mortgage	\$	Years left on mortgage	
Mortgage company		Telephone ()	
Annual tax	\$		

ADDITIONAL PROPERTY (Rental or Vacation)			
Fair market value	\$	Monthly payment	\$
Amount left on mortgage	\$	Years left on mortgage	
Mortgage company		Telephone ()	
Annual tax	\$		

VEHICLES Vehicle 1			
Fair market value	\$		
Loan balance	\$	Monthly payment	\$
Loan company		Telephone ()	

VEHICLES Vehicle 2			
Fair market value	\$		
Loan balance	\$	Monthly payment	\$
Loan company		Telephone ()	

HOMEOWNERS INSURANCE			
Company			
Agent		Policy Number	
Annual cost	\$	Telephone ()	

AUTOMOBILE INSURANCE			
Company			
Agent		Policy Number	
Annual cost	\$	Telephone ()	

LIFE INSURANCE			
Husband's amount	\$	Annual cost	\$
Company		Telephone ()	
Type of policy		Policy number	
Beneficiary			
Wife's amount	\$	Annual cost	\$
Company		Telephone ()	
Type of policy		Policy number	
Beneficiary			

HEALTH INSURANCE			
Husband's amount	\$	Annual cost	\$
Company		Telephone ()	
Type of policy		Policy number	
Beneficiary			
Wife's amount	\$	Annual cost	\$
Company		Telephone ()	
Type of policy		Policy number	
Beneficiary			

LONG-TERM CARE INSURANCE			
Husband's amount	\$	Annual cost	\$
Company		Telephone ()	
Type of policy		Policy number	
Beneficiary			
Wife's amount	\$	Annual cost	\$
Company		Telephone ()	
Type of policy		Policy number	
Beneficiary			

CREDIT CARDS	
Card type	Telephone ()
Account number	
Card type	Telephone ()
Account number	
Card type	Telephone ()
Account number	
Card type	Telephone ()
Account number	

CHECKING ACCOUNTS

Name of bank	Telephone ()
Account number	Titling
Name of bank	Telephone ()
Account number	Titling

SAVINGS ACCOUNTS

Name of bank	Telephone ()
Account number	Titling
Name of bank	Telephone ()
Account number	Titling

INVESTMENT ACCOUNTS

403(b) or 401(k)

Company	Telephone ()
Account number	

403(b) or 401(k)

Company	Telephone ()
Account number	

IRA

Company	Telephone ()
Account number	

IRA

Company	Telephone ()
Account number	

BROKERAGE ACCOUNT

Company	Telephone ()
Account number	

OTHER

Company	Telephone ()
Account number	