

ASSET VALUES AND OWNERSHIP SPREADSHEET FOR INDIVIDUALS

Instructions: Please provide estimated values and, where appropriate, the type of account or investment.

Name: _____

Description	Owned Individually	Owned Jointly with	Mortgage/Loans
Primary Residence			
Other Real Estate			
Retirement Investments (IRAs, 401(k)s, 403(b)s, SEPs, Keoghs, etc.)			
Cash Equivalents (Checking, Savings, CDs, etc.)			
Non-Retirement Investments (Stocks, Bonds, Mutual Funds, etc.)			
Life Insurance			
Annuities			
Personal Property (jewelry, art, furniture, etc.)			
Business Interests (deferred compensation, stock options, receivables, etc.)			
Other			
Totals	\$	\$	\$