

ASSET VALUES AND OWNERSHIP SPREADSHEET FOR MARRIED COUPLES

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

Spouse 1 Name: _____ Spouse 2 Name: _____

Description	Owned by Spouse 1	Owned by Spouse 2	Owned Jointly	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	\$	\$	\$	\$