

	Value of assets in Husband's name	Value of assets in Wife's name	Value of assets in joint names or payable to Spouse on death
Residence			
Value:			
Mortgage:			
Net:			
Other real estate			
Value:			
Mortgage:			
Net:			
Retirement assets (H):			
401K			
IRA			
Other			
Beneficiary:			
Retirement assets (W):			
401K			
IRA			
Other			
Beneficiary:			
Annuities			
Insured/Owner:			
Beneficiary:			
Stocks/Bonds/Mutual Funds			
Checking/Savings/MM/CDs			
Life Ins death benefit (H)			
Beneficiary:			
Life Ins death benefit (W)			
Beneficiary:			
Automobile(s)			
Furniture, jewelry, etc.			
Business interests			
Other			
Totals			

LIABILITIES	Husband	Wife	Joint
Credit cards			
Other			
Totals			
NET VALUE			

INCOME	Husband	Wife	Joint
Salary			
Pension			
Social Security			
Investment income			
Other			
Totals			