

**CONFIDENTIAL FINANCIAL INFORMATION
(SUMMARY)**

A. SUMMARY OF ASSETS

Asset Category	Community Property of Husband & Wife	Husband's Separate Property	Wife's Separate Property
1. Primary Residence			
2. Vacation Home			
3. Other Real Estate			
4. Brokerage Accounts			
5. Individually Owned Stocks, Bonds and Mutual Funds (Publicly Traded)			
6. Stock in Closely-held Corporations			
7. Partnerships, Limited Partnerships, and LLCs			
8. Sole Proprietorships			
9. Cash in Banks and Other Financial Institutions			
10. Mortgages and Notes Receivable			
11. Life Insurance Owned On Your Life			
12. Individual Retirement Accounts			
13. Qualified Retirement Plan Benefits (Pension, Profit Sharing, 401(k))			
14. 403/Tax Sheltered Annuities			
15. Tax Deferred (Nonqualified) Annuities			
16. Autos, Boats, Airplanes, Etc.			
17. Artwork and Collections			
18. Jewelry			
19. Household Contents			
20. Digital Assets			
21. Other Miscellaneous Property			
TOTAL			

B. SUMMARY OF LIABILITIES

Category of Debt	Both Liable	Husband Liable	Wife Liable
1. Debts Secured by Real Estate			
2. Debts Secured by Other Assets			

3. Credit Card and Unsecured Debt			
4. Business Debt			
TOTALS			

C. SUMMARY OF INCOME

Source and Type of Income	Annual Amount
Husband's Salary / Self-Employment Income	
Wife's Salary / Self-Employment Income	
Interest / Dividends	
Oil & Gas / Royalty Income	
Rental Income	
Other	
TOTAL ANNUAL INCOME	

D. MISCELLANEOUS

Inheritances. If either Husband or Wife owns inherited property not previously listed, or expects to inherit any property from parents or others, please give general description, source, and approximate value.

Trusts/ Beneficial Interests. If either Husband or Wife created a trust, is a trustee of any trust, or is a beneficiary of any trust, or has any power with respect to any trust, or has any estate in property for life, please give general description of circumstances and approximate value. Please provide a copy of each trust for review.

Gifts. If either Husband or Wife has at any time made gifts, including birthday, graduation, or holiday gifts of cash or other property having a value in excess of \$13,000 or gifts of future interests, please indicate the dates, recipients, and values of such gifts, the general nature of the gift property, and whether you filed any United States gift tax returns in connection with such gifts:

Digital Assets. Do you own any digital assets? If so, please describe:

Pets. Do you own any pets? If so, please describe:

Do you have a safe deposit box? _____ No _____ Yes If yes, where is it located? _____
Who has access to the box? _____

Have you prepaid or pre-arranged your funeral? _____ No _____ Yes If so, please describe:

Have you purchased long-term care insurance? _____ No _____ Yes If so, please describe:

Have you omitted any assets of significant value? _____ No _____ Yes If so, please describe:

Date financial information prepared: _____.

Signature of Husband
Name (Printed): _____

Signature of Wife
Name (Printed): _____

Comments / Questions: