

**CONFIDENTIAL FINANCIAL INFORMATION
(SUMMARY)**

A. SUMMARY OF ASSETS

Asset Category	Value
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	Liability
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
Salary / Self-employment Income	
Interest / Dividends	
Oil & Gas / Royalty	1
Rental Income	
Other Income	
TOTAL ANNUAL INCOME	

D. MISCELLANEOUS

Inheritances. If you own inherited property not previously listed, or expect to inherit any property from parents or others, please give general description, source, and approximate value.

Trusts/ Beneficial Interests. If you have created a trust, are a trustee of any trust, or are a beneficiary of any trust, or have any power with respect to any trust, or have 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 you have 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
Name (Printed): _____

Comments / Questions