

**FINANCIAL SUMMARY-SINGLE**

	<b><u>ASSETS</u></b>	<b><u>LIABILITIES</u></b>
Bank Accounts [attach copies of statements]	\$ _____	\$ _____
Real Estate (residence) [attach copy of deed]	\$ _____	\$ _____
Real Estate (other) [attach copies of all deeds]	\$ _____	\$ _____
Certificates of Deposit (CDS) [attach copies of statements]	\$ _____	\$ _____
Stocks - (Not Held by Broker) [attach copies of all certificates]	\$ _____	\$ _____
Stocks - (Held by Broker) [attach copies of brokerage statements]	\$ _____	\$ _____
Bonds - (Not Held by Broker) [attach copies of all bonds]	\$ _____	\$ _____
Bonds - (Held by Broker) [attach copies of brokerage statements]	\$ _____	\$ _____
Mutual Funds [attach copies of statements]	\$ _____	\$ _____
Note and Mortgage Receivables [attach copies of Notes & Mortgages]	\$ _____	\$ _____
Business Interests [attach copies of stock certificates, partnership agreements and/or other documentation]	\$ _____	\$ _____
Future Inheritance, etc.	\$ _____	\$ _____
Automobiles	\$ _____	\$ _____
Jewelry & Collections	\$ _____	\$ _____
IRAs [attach copies of statements]	\$ _____	\$ _____
Non-IRA Tax Qualified Retirement Plans [attach copies of statements]	\$ _____	\$ _____
Life Insurance [attach copies of all policies]	\$ _____	\$ _____
Annuities [attach copies of all policies]	\$ _____	\$ _____
Other Assets [attach copies of documentation pertaining to such assets]	\$ _____	\$ _____
<b>TOTALS</b>	\$ _____	\$ _____