

Assets Schedule Married

James M. Jaxtheimer, PC

Primary Residence			
	Husband	Wife	Joint
Fair Market /Appraised Value			
Mortgage Balance			
Equity Loan/Line of Credit Balance			
Net Equity			

Other Real Property (1)			
	Husband	Wife	Joint
Street Address:			
City and State:			
County:			
Fair Market/Appraised Value			
Mortgage Balance			
Equity Loan/Line of Credit			
Net Equity			

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Other Real Property (2)			
	Husband	Wife	Joint
Street Address:			
City and State:			
County:			
Fair Market/Appraised Value			
Mortgage Balance			
Equity Loan/Line of Credit			
Net Equity			

Bank Accounts/CDs/Money Market				
Name of Institution and Type of Account	Beneficiary (if applicable)	Husband	Wife	Joint
<i>Ex: Hometown Bank, Savings</i>				<i>\$2,000</i>

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Stocks/Bonds/Mutual Funds				
Name of Institution and Type of Account	Beneficiary (if applicable)	Husband	Wife	Joint
<i>Ex: ABC Stock</i>			<i>\$5,000</i>	

Life Insurance				
Company Name and Face Value	Beneficiary	Husband	Wife	Joint
<i>Ex: Patriot Insurance</i>	<i>Anne Smith (wife)</i>	<i>\$ 1 Million</i>		

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Retirement Account			
Custodian Name, Value, and Type	Beneficiary	Husband	Wife
<i>Ex: Fidelity IRA</i>	<i>Jack Smith (son)</i>	<i>\$250,000</i>	

Business Interests Proprietorship/LLC/Corporation/Partnership			
Entity Name/Type and Estimated Value (e.g., LLC, Sub-S, Sole Proprietorship, etc.)	Husband	Wife	Joint
<i>Ex: Business Solutions, LLC</i>	<i>\$50,000</i>		

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Tangible Property Estimated Values			
	Husband	Wife	Joint
Automobile			
Furniture and Household Items			
Jewelry			
Antiques/Collectibles/Coins			
Other (e.g., watercraft, RV, etc.)			

Vested Interests - Estates or Trusts			
Description	Husband	Wife	Joint

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Income			
	Husband	Wife	Joint
Wages			
Self Employment			
Pensions			
Social Security/Disability/Other			
Investments			