

Assets Schedule Single

James M. Jaxtheimer, PC

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

Other Real Property (1)		
	Individual	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)

	Individual	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)	Individual	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)	Individual	Joint
<i>Ex: ABC Stock</i>		<i>\$5,000</i>	

Life Insurance		
Company Name and Face Value	Beneficiary	Individual
<i>Ex: Patriot Insurance</i>	<i>Anne Smith</i>	<i>\$ 1 Million</i>

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Retirement Account		
Custodian Name, Value, and Type	Beneficiary	Individual
<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.)	Individual
<i>Ex: Business Solutions, LLC</i>	<i>\$50,000</i>

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

Pending Distributions - Estates or Trusts		
Description	Individual	Joint

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Income	
	Individual
Wages	
Self Employment	
Pensions	
Social Security/Disability/ Other	
Investments	