

Farrell & Grochowski
375 Center St.
Wallingford, CT 06492

DATE: _____

ASSET INFORMATION FOR ESTATE PLANNING

Your name: _____ DOB: _____

Spouse's name: _____ DOB: _____

Address: _____

City/State/Zip: _____

Tel. No. _____ Email Address: _____

ASSET INFORMATION

Please list each asset you own. Please use the following codes to identify whose name is on each asset.

- | | |
|--------------|---|
| H | if the asset stands in husband's name alone |
| W | if the asset stand in wife's name alone |
| JT | if held in both husband and wife's names |
| I | if the asset stands in an unmarried individual's name alone |
| JT/w/someone | if asset is jointly held with someone other than spouse |



Real Estate

How Held	Address of Property	Taxes	Amount of Any Current Value
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

How much is your homeowner's insurance premium? \$ _____

Do you have title insurance? _____ If so, with whom? _____ Cost? _____

Bank Accounts

How Held	Name of Bank	Type of Account	Current Value
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

IRAs/401K/403B

Owner	Name of Company	1 st Beneficiary	2 nd Beneficiary	Current Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Life Insurance

Insured	Name of Company	1 st Beneficiary	2 nd Beneficiary	Current Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Have there been any transfers of money or other assets within the last three years? _____

If so, please provide complete details.



Stocks/Bonds/Mutual Funds/Annuities

Who Owns	Company Name	# of shares	Current Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Automobiles

Owner	Year/Make/Model	Loan Amount Owed	Current Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Assets

Owner	Description	Any Loan?	Current Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Monthly Income

Please list all sources of income for each of you. Please provide a monthly gross figure, without any deduction for taxes or other withholdings. Please separate your income between you. For joint assets, such as bank accounts, please split the interest income equally between you.

Type	Husband	Wife	Total
Wages	\$ _____	\$ _____	\$ _____
Social Security	\$ _____	\$ _____	\$ _____
Pension #1	\$ _____	\$ _____	\$ _____
Pension #2	\$ _____	\$ _____	\$ _____
Interest- Dividends	\$ _____	\$ _____	\$ _____

