

THE LAW OFFICE OF
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 Licensed in Florida and South Carolina
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 Supreme Court as a Specialist
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ASSET SUMMARY SHEET
 (Married United States Citizens)

 Husband's Name

 Wife's Name

DESCRIPTION OF ASSETS	VALUE OF ASSETS OWNED BY HUSBAND	VALUE OF ASSETS OWNED BY WIFE	VALUE OF ASSETS OWNED AS JOINT TENANTS WITH RIGHT OF SURVIVORSHIP
Real Estate	_____	_____	_____
Stocks & Bonds	_____	_____	_____
Checking Accounts	_____	_____	_____
Savings & CDs	_____	_____	_____
Notes & Receivable	_____	_____	_____
Life Insurance	_____	_____	_____
Pensions/IRAs	_____	_____	_____
Annuities	_____	_____	_____
Other Property	_____	_____	_____
Less Debts	(_____)	(_____)	(_____)
TOTALS	_____	_____	_____

If the property is owned by husband and wife as Joint Tenants with Right of Survivorship, the entire amount should be shown as owned as Joint Tenants with Right of Survivorship, and not in either the husband or the wife column. If an asset is owned as Tenants in Common by husband and wife, then one-half (1/2) of the asset should appear in the husband's column and one-half (1/2) of the asset should appear in the wife's column. For property in a Revocable Trust, please place an "RT" beside the amount. If property is in an Irrevocable Trust, please place an "IT" beside the amount.

This information will be used in planning your estate. If the information is not correct, the advice which you are given may not be correct and may create unexpected and adverse estate planning and tax consequences. Please sign below as your acknowledgment that the information is substantially correct and that we may rely upon its validity in advising you.

_____, 20____.
 SIGNATURE DATE

_____, 20____.
 SIGNATURE DATE