

PLAN AHEAD - ASSETS

	Totals	
Savings and Checking Accounts		*
Investment Accounts		*
Stocks and Bonds		*
Retirement Accounts		*
Home Value		
Other Real Estate		
Automobiles		
Other Assets		
Total		

* PROFESSIONAL FINANCIAL PLANNER WILL ASK FOR A COPY OF THE LAST STATEMENTS FOR THESE ACCOUNTS



PLAN AHEAD – ASSETS DIRECTIONS

	Totals	
Savings and Checking Accounts	Snap shot –total most current balances	*
Investment Accounts	These are the accounts from which you received 1099's. Note totals in each account under "Notes" on the Financial Information Manager you used in Part 2.	*
Stocks and Bonds	Note totals in each account in the "Notes" section of the Financial Information Manager you used in Part 2.	*
Retirement Accounts	Note totals in each account in the "Notes" section of the Financial Information Manager you used in Part 2.	*
Home Value	Research this online on real estate sites like Zillow. Many county treasurer offices also maintain websites showing home valuations.	
Other Real Estate	This would include investments, vacation homes and the like.	
Automobiles	Value of automobiles you fully own can be determined online.	
Other Assets	Any other assets you own that have value over several thousand dollars. Collections, tools, antique furniture, jewelry, etc.	
Total	Total of all amounts above	

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