



CURRENT ASSETS LIST

DATE: _____, 20____

I. Identification

First Name _____ Last Name _____

Spouse: First Name _____ Last Name _____

II. Personal Property & Assets

Vehicles (Cars, Boats, Cycles, RV, Airplanes, Jet Skis, OHVs, etc): _____

Stocks/Bonds: _____

Retirement Accounts (401k, Pensions, Mutuals, IRA's, etc): _____

Insurance Policies (Life, Health, Annuities, Long Term Care, Disability, etc.): _____

Trademarks: _____

Copyrights/Patents: _____

III. Financials

Bank Accounts (Savings, Checking, etc.): _____

IV. Real Estate

Property (Primary & Vacation Homes): _____

Property (Leasehold): _____

Property (Rental Incomes, Time Shares, etc.): _____

V. Business Entities, Trusts & Investments

Name, Date Established, State of Incorporation & Ownership %: _____

VI. Other Assets (Furniture, Tools, Patents, Leases, Equipment, Notes, Court Awards, etc.) _____
