

LEGAL AND FINANCIAL WORKSHEET: Assets

ASSETS	Account Number	Institution Name	Institution Address	Institution Phone Number	Current Value	Owner(s)	Location of Document(s)
Savings							
Checking							
Certificates of Deposit (CD)							
Stocks							
Bonds							
Property (Current Value)							
Retirement Accounts (IRA, 401K)							
Life Insurance Policy							
Long-Term Care Insurance							
Trusts							
Total Estimated Assets							

LEGAL AND FINANCIAL WORKSHEET: Income

INCOME	Account Number	Institution Name	Institution Address	Institution Phone Number	Income	Owner(s)	Location of Document(s)
Employment Income							
Pension							
VA Benefits							
Government Benefits (SSI, SSDI)							
Dividends							
Reverse Mortgage							
Other Household Income (Rental Property, etc.)							
Total Estimated Monthly Income							

LEGAL AND FINANCIAL WORKSHEET: Expenses

EXPENSES	Account Number	Institution Name	Institution Address	Institution Phone Number	Payment Amount	Payment Due Date	Location of Document(s)
Mortgage/Rent Payment							
Property Taxes							
Loan Payments							
Alimony/ Child Support							
Utilities							
Other Insurance Premiums/ Policies							
Total Monthly Expenses							

LEGAL AND FINANCIAL WORKSHEETS: Legal Documents and Miscellaneous

LEGAL DOCUMENTS	Owner(s)	Location of Document(s)	Notes
State ID/ Driver's License			
Passport			
Marriage License			
Social Security Card			
Living Will			
Power of Attorney (Property)			
Power of Attorney (Health Care)			
Standard Will			
Vehicle Registration			
Birth Certificate			

MISCELLANEOUS	Account Number	Institution Name	Institution Address	Institution Phone Number	Location of Document(s)
Safety Deposit Box					