

Elisabeth J. Rubel PLLC
Joint Asset Questionnaire for Estate Planning

Date Completed: _____

Spouse 1 Information:

Name:

Address:

DOB:

U.S. Citizen [Y / N]

Spouse 2 Information:

Name:

Address:

DOB:

U.S. Citizen [Y / N]

SUMMARY OF ASSETS

Please enter approximate total values for each category of assets in the appropriate column, depending on who owns the asset.

	Registered in Spouse 1 Name	Registered in Spouse 2 Name	Registered in Joint Name	TOTAL
Residence (less mortgage)	\$_____	\$_____	\$_____	\$_____
Cottage or condominium (less mortgage)	_____	_____	_____	_____
Other real estate	_____	_____	_____	_____

	Registered in Spouse 1 Name	Registered in Spouse 2 Name	Registered in Joint Name	TOTAL
Bank accounts and other cash deposits	_____	_____	_____	_____
Marketable securities	_____	_____	_____	_____
Closely-held business interest	_____	_____	_____	_____
Life insurance (face amount less policy loans)	_____	_____	_____	_____
Pension or profit-sharing plans, IRAs, 401(k)s, 403(b)s, etc.	_____	_____	_____	_____
Other assets	_____	_____	_____	_____
TOTAL	\$ _____	\$ _____	\$ _____	\$ _____

Names (and dates of birth) of children, their spouses, and grandchildren				
<u>Children</u>	<u>Dates of Birth</u>	<u>Spouse</u>	<u>Grandchildren</u>	<u>Dates of Birth</u>
_____	_____	_____	_____	_____ _____ _____
_____	_____	_____	_____	_____ _____ _____
_____	_____	_____	_____	_____ _____ _____

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