



14. Children and deceased children who have issue now living ( indicate if a child is a child of a current marriage, whether a child is of a prior marriage of either spouse and whether child is adopted by either or both spouses):

<i>Name</i>	<i>Birthdate</i>	<i>Residence</i>	<i>Spouse</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

15. Other Dependents:

<i>Name</i>	<i>Relationship</i>	<i>Residence</i>	<i>Annual Support (\$)</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

*B. GIFTS*

*Provide details relating to:*

1. Existing custodial accounts for minors: \_\_\_\_\_  
\_\_\_\_\_
2. Irrevocable trusts created by husband and/or wife: \_\_\_\_\_  
\_\_\_\_\_
3. Gifts in excess of \$10,000.00 to a single donee in a single year: \_\_\_\_\_  
\_\_\_\_\_
4. Have you ever filed a federal gift tax return?      Yes \_\_\_\_\_      No \_\_\_\_\_

*C. ASSETS*

		<i>Husband's</i>	<i>Wife's</i>	<i>Joint</i>	<i>Community</i>
1.	Checking Account	\$ _____	\$ _____	\$ _____	\$ _____
2.	Savings Account	_____	_____	_____	_____
3.	Certificates of Deposit	_____	_____	_____	_____
4.	Other Cash Funds	_____	_____	_____	_____
5.	Mutual Funds	_____	_____	_____	_____
6.	Bonds	_____	_____	_____	_____
7.	Listed Stocks	_____	_____	_____	_____
8.	Unlisted Stocks	_____	_____	_____	_____
9.	Family Corporations	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
10.	Partnerships	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
11.	Family Home	_____	_____	_____	_____
12.	Vacation Home	_____	_____	_____	_____
13.	Other Real Estate	_____	_____	_____	_____
14.	Oil and Gas Properties	_____	_____	_____	_____
15.	Personal Property:	_____	_____	_____	_____
	Automobile	_____	_____	_____	_____
	Household Items	_____	_____	_____	_____
	Jewelry	_____	_____	_____	_____
	Other	_____	_____	_____	_____
16.	Other Assets:	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____

*Note:* Fair market value should be indicated - do not reduce value by any liability reported in Section D. If you believe some circumstances would have an unusual effect on valuation of a particular item, explain on last page. Enter total amounts here as applicable to each category. If several assets are included in a category or if other specific information is relevant, give details on last page.

*D. LIABILITIES*

		<i>Husband</i>	<i>Wife</i>	<i>Joint or Community</i>
1.	Checking Account	\$ _____	\$ _____	\$ _____
2.	Mortgages:			
	Family Home	_____	_____	_____
	Other	_____	_____	_____
3.	Other Debts:	_____	_____	_____

*E. LIFE INSURANCE*

		<i>Type and Company</i>	<i>Face Amount</i>	<i>Owner</i>	<i>Beneficiary</i>
1.	Husband	_____	\$ _____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
2.	Wife	_____	\$ _____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____

*F. ADVISORS*

		<i>Name</i>	<i>Address</i>	<i>Telephone</i>
1.	Accountant	_____	_____	_____
2.	Stock Broker	_____	_____	_____
3.	Financial Planner	_____	_____	_____
4.	Insurance Advisor	_____	_____	_____

*G. EMPLOYEE BENEFITS*

		<i>Husband</i>	<i>Wife</i>	<i>Beneficiary</i>
1.	Deferred Compensation	\$ _____	\$ _____	_____
2.	Post-Death Salary Continuation	_____	_____	_____
3.	Stock Options	_____	_____	_____
4.	Restricted Stock	_____	_____	_____
5.	Pension Plan	_____	_____	_____
6.	Profit Sharing or Thrift Plan	_____	_____	_____
7.	IRA and Keogh Plan	_____	_____	_____
8.	Other Benefit Plans	_____	_____	_____

*H. TRUSTS AND INHERITANCES*

		<i>Husband</i>	<i>Wife</i>	<i>Children</i>
1.	Anticipated Inheritance (other than from husband or wife)	\$ _____	\$ _____	\$ _____
2.	Existing Trust Funds	\$ _____	\$ _____	\$ _____
3.	Comments regarding anticipated inheritance or trust funds: _____			
	_____			
	_____			
	_____			
	_____			

