NET WORTH INFORMATION

SAVINGS AND INVESTMENTS: TYPES OF ACCOUNTS				
Social Security	Long-Term Care	Life Insurance		
Checking	Fixed Annuities	403b/TSA	Corporate Bonds	Businesses
Savings	401k	Profit Sharing Plan	Stocks	Home
Money Markets	Roth 401k	Deferred Comp.	Variable Annuities	Real Estate
CD's	IRA	Government Bonds	Indexed Annuities	Tax Shelters
Savings Bonds	Roth IRA	Municipal Bonds	Mutual Funds	Other

SAVINGS AND INVESTMENTS			
Ownership (who owns the account)	**Account Type**	**Current Value**	**Additional Information for Account**
EX: Jane Smith	Home	$250,000	Balance $100,000

LIFE INSURANCE			
Owner/ Type	**Death Benefit**	**Cash Value**	**Year purchased/Company**

LONG-TERM CARE			
Owner/Type	**Benefit Amount**	**Benefit Period**	**Waiting Period/Company**