

Excerpts from Financial Worksheet

Employment Income _____

Retirement/Pension _____

Investment Income _____

Alimony _____

Other Income _____

Total Income _____

Assets (Current Market Value)

House/Condominium _____

Other Property _____

Stocks and Bonds _____

Pension (IRA, 401K) _____

Savings/Money Market Accounts _____

Certificates of Deposit _____

Insurance (Cash Value) _____

Annuities _____

Checking Account Balance _____

Automobile(s) _____

Prepaid Burial _____

Furnishings _____