

REAL PROPERTY

Please include a copy of your deed, contract for deed, or title insurance policy
 *Tax statements are not sufficient as they do not contain the official legal description

	Title of Property <small>(ex: Home, Cabin, North 40, The Flintstone Place, etc.)</small>	Physical Address	Current type of Ownership <small>*See below</small>	Copy of Deed Attached?	Approx. Fair Market Value
Included				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
Additional \$75 per deed				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	

Types of Ownership:

Husband and Wife (H&W)
 Only in Wife's Name (W)
 Only in Husband's Name (H)
 Joint with Others (JO)

Tenants in Common (TIC)
 Limited Liability Company (LLC)
 Corporation (CO)
 Joint or Family Revocable Trust (JT)

Husband's Revocable Trust (HT)
 Wife's Revocable Trust (WT)
 Irrevocable Trust (IRT)
 Other (please explain)

Community Property (CP)

*only in community property states: AZ, ID, NV, CA, LA, NM, TX, WA and WI

FINANCIAL ACCOUNTS

Name of Institution	Institution Address	Type of Asset <small>*See below</small>	Current type of Ownership <small>*See below</small>	Account Number

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Type of Asset:

Checking (CHK)
 Safe Deposit Box (BOX)

Savings (SAV)
 Other (please specify)

Money Market (MM)

Certificate of Deposit (CD)

BROKERAGE ACCOUNTS

Stocks, Bonds, Mutual Funds, and/or Retirement Accounts Held by Your Broker or Employer

Please include a copy of a recent statement. This assists us in determining what type of account it is, which is necessary to fund the account correctly.

Name of Institution	Institution Address (please include Advisor name if known)	Statement Included?	Current type of Ownership *See below	Account Number
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

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BUSINESS INTERESTS

Interests Owned in any Registered Partnerships, Limited Liability Companies or Corporations

Name and Address of Business	Type of Entity Partnership, LLC, S-Corp, C-Corp	State the Business is Registered in	Current type of Ownership *See below	Number of Shares or Percentage of Ownership	Operating Agreement, Partnership Agreement or Bylaws Included?
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

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VEHICLES

Cars, Trucks, Boats, Motor Homes, Mobile Homes, Aircraft, etc.

Only include if the vehicle is considered a “high value” asset worth more than \$100,000.00 OR if the vehicle is used for business purposes but not in the business name.

Vehicle Description	VIN or Identification Number	Copy of Title Included?	Current type of Ownership <small>*See below</small>	Approximate Value
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

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PUBLICLY TRADED STOCK OR BONDS HELD IN CERTIFICATE FORM

Stocks, Bonds, Mutual Funds Held by Your Broker

Please include a copy of a recent statement. This assists us in determining what type of account it is, which is necessary to fund the account correctly.

Name and Address of Company	Number of Shares	Statement Included?	Current type of Ownership <small>*See below</small>
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

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LIVESTOCK BRANDS

Brand Identification (please include cattle, horses, sheep or all)	Brand ID Number	State of Brand	Current type of Ownership *See below

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OIL, GAS AND MINERAL INTERESTS

Please include a copy of a recent statement and/or deed. This assists us in determining what type of account it is, to ensure the account is funded correctly.

Description	Leased? If so, to whom?	Producing Property?	Current type of Ownership *See below
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

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OTHER

Crypto Currency, Precious Metals, Jewelry, Firearms Collections or other assets worth more than \$5,000

Description of Asset	Current type of Ownership *See below	Value

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