

CARNEY DYE, LLC

Financial Information Sheet

Client Name: _____

Who is your Accountant? _____

Who is your Insurance Agent? _____

Who is your Stockbroker or Financial Planner? _____

ASSETS

Please list the approximate current values for any of the following assets you or spouse (if applicable) have:

Company Plans and Insurance

Pension Plan: _____ Spouse: _____

Profit Sharing Plan: _____ Spouse: _____

IRA: _____ Spouse: _____

401(k) Plan: _____ Spouse: _____

Insurance Policies (Face Value): _____ Spouse: _____

Cash - Please list the owner for each of the following assets (you, spouse or joint):

Checking: _____

Savings: _____

CD: _____

Money Market: _____

Stocks: _____

Bonds: _____

Mutual Funds: _____

Other Assets

Business Interests (Include closely held stock and partnership): _____

Home Real Estate in Alabama: _____

Other Real Estate in Alabama: _____

Real Property Owned in Another State: _____

Mortgages (Payable to you): _____

Personal Property (e.g. cars, jewelry, furniture, etc): _____

www.carneydye.com

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Additional Assets or other things we may need to know about (not already listed above): _____

LIABILITIES

Please list the approximate current values for any current liabilities you or your spouse (if applicable) have.

Mortgage: _____

Automobile Loan: _____

Medical Bills: _____

Student Loan: _____

Credit Card: _____

Other: _____
