

REAL & PERSONAL PROPERTY QUESTIONNAIRE

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Name: _____ DATE: _____ Number of Pages: _____

Read through the list before starting to complete it. Give your best estimate of the VALUE for each category using GARAGE SALE values if appropriate. If you need to explain or detail an item, mark the item with a STAR (*) and explain on the back of this page. **If zero, leave blank.**

1. Cash on hand:.....\$ _____
2. Checking, Savings or other financial accounts, certificates of deposit or shares in banks, credit unions, or the like:.....\$ _____
3. Security Deposits with public utilities, telephone companies, landlords and others:...\$ _____
4. Household goods & furnishings, including audio, video and computer equipment:...\$ _____
5. Books, pictures & other art objects, antiques, stamp, coin, record, tape, compact disc and other collections, or collectables.....\$ _____
6. Wearing apparel:\$ _____
7. Furs & Jewelry:\$ _____
8. Firearms & sports, photographic & other hobby equipment:\$ _____
9. Interests in insurance policies that have cash surrender value:\$ _____
10. Annuities:\$ _____
11. Interests in IRA, ERISA, Keogh, or other pension or profit sharing plans:.....\$ _____
12. Stock & interests in incorporated and unincorporated businesses:\$ _____
13. Interests in partnerships or joint ventures:.....\$ _____
14. Government & corporate bonds & other negotiable and non-negotiable instruments:\$ _____
15. Accounts Receivable:\$ _____
16. Alimony, maintenance, support & property settlements you are entitled to:.....\$ _____
17. Other liquidated debts owing to you including tax refunds:.....\$ _____
18. Future interests, life estates, and rights or powers exercisable for your benefit:.....\$ _____
19. Has anyone died & left you an inheritance? Yes: [] No: []
Is that event likely in the next year? Yes: [] No: []
20. Other contingent & unliquidated claims of every nature, including tax refunds, personal injury claim, counterclaims and rights to set-off claims:\$ _____
21. Patents, copyrights and other intellectual property:\$ _____
22. Licenses, franchises & other general intangibles:\$ _____
23. **Automobiles, trucks, trailers & other vehicles:.....\$ _____**

List On Back:

- Boats, motors & accessories:\$ _____
24. Aircraft & accessories:\$ _____
25. Office equipment, furnishings & supplies:.....\$ _____
26. Machinery, fixtures, equipment & supplies used in business:\$ _____
27. Inventory:\$ _____
28. Animals or pedigreed pets that have a resale value:.....\$ _____
29. Crops-Growing or Harvested:\$ _____
30. Farming equipment & implements:\$ _____
31. Farm supplies:\$ _____
32. **Other personal property of any kind NOT already listed:\$ _____**

List on back:

33. **Real Property: List on Back: Include address of each property (if more than one), most recent tax value of property, mortgages owed and name and address of mortgage holders, and if taxes & insurance are included in the mortgage payments.**