

Bonds

Bonds, Savings Bonds, and U.S. Government Securities

Company	Interest Rate	Certificate No.	Maturity Date	Purchase Price	Value at Maturity	If Registered, In Whose Name(s)

Location _____

Mutual Funds

Company	Type of Fund	Date(s) Acquired	Amount Invested	Market Value	In Whose Name(s)

MISCELLANEOUS ASSETS IN EXCESS OF \$1,000

Boats and RVs not titled, Jewelry, Valuable Collections, and other Significant Assets not already listed

Description of Property	Value	Location of Property

INSURANCE POLICIES

Annuities

Company	Description	Value	Location of Contract

Life Insurance

Company & Agent	Policy Number	Face Amount	Policy Loan?	Beneficiaries Named

Long-Term Disability Coverage

Company & Agent	Policy Number	Policy Amount	Type of Policy	Person Covered

Nursing Home Coverage

Company & Agent	Policy Number	Policy Amount	Type of Policy	Person Covered

RETIREMENT PLANS
IRAs, 401(k)s, Pensions, and other Retirement Accounts

Company	Type of Plan	Value	Beneficiaries Named

SOLE PROPRIETORSHIPS, TRUSTS, and BUSINESS INTERESTS

Name of Entity and Business Form (i.e. Sole Proprietor, Partnership, LLC, Corp., etc...)	Percent Owned	Value of Interest	Owner, Partner, Co-Owner?

Attorney Todd W. Schluesche
KITTELSEN, BARRY, WELLINGTON, THOMPSON AND SCHLUESCHE
916 17th Avenue
P.O. Box 710
Monroe, WI 53566-0710
Ph: (608) 325-2191
Fax: (608) 325-7968
Direct email: todd@kittlaw.com