

BASIC PERSONAL INFORMATION

[Prepared/Revised: As Of _____]

My Name: _____

Spouse Name: _____

Mailing Address: _____

Contact
Info:

Telephone (Landline): _____

Cell Phone: _____

Email Address: _____

Other: _____

Other: _____

Professional Service Providers:

Medical: _____

Contact No.: _____

Legal: _____

Contact No.: _____

Accountant: _____

& Fax _____

Contact No.: _____

Insurance - _____

Life _____

Contact No.: _____

EXAMPLE

MY/OUR ASSETS
[“Stuff” I/We Own]

[Prepared/Revised: As Of _____]

Real Estate Ownership – Continued:

Vacation Property

Street Address: _____

Mortgage Co.: _____

Loan Number: _____

Loan Terms: _____

MonP + I Amt: _____

Mon Pmt Day: _____

Contact Info: _____

On-Line: Web Add – www. _____

User Name - _____

Passw _____

Investment Real Property [Developed or Undeveloped real Estate]

Street Address: _____

Mortgage Co.: _____

Loan Number: _____

Loan Terms: _____

MonP + I Amt: _____

Mon Pmt Day: _____

Contact Info: _____

On-Line: Web Add – www. _____

User Name - _____

Password - _____

