

Lazar and Schwartz
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ASSETS AND SECURED DEBT

**I. BANK ACCOUNTS, STOCK ACCOUNTS, BONDS, MUTUAL FUNDS, MONEY
MARKETS, CD'S, ANNUITIES**

<u>Account Location and Number</u>	<u>Title</u>	<u>Value</u>	<u>Date</u>
	H W J		
	H W J		
	H W J		
	H W J		
	H W J		
	H W J		
	H W J		
	H W J		
	H W J		
	H W J		

Provide most recent account statements

II. REAL ESTATE

A. Primary Residence:

Address: _____

Title: _____

Date of Purchase: _____

Original Mortgage: _____

Current Remaining Mortgage: _____

Interest Rate: _____ Term: _____ Mo. Payment: _____

Fixed or Adjustable: _____

(Attach last mortgage statement)

Home Equity: _____

Original Amount: _____ Amount Due: _____

Interest Rate: _____ Mo. Payment: _____

Purpose: _____

B. Secondary Residence (if any):

Address: _____

Title: _____

Date of Purchase: _____

Original Mortgage: _____

Current Remaining Mortgage: _____

Interest Rate: _____ Term: _____ Mo. Payment: _____

Fixed or Adjustable: _____

(Attach last mortgage statement)

Home Equity: _____

Original Amount: _____ Amount Due: _____

Interest Rate: _____ Mo. Payment: _____

Purpose: _____

III. RETIREMENT ASSETS

OWNER	TYPE (Pension, Tax Def. Comp.,401K, IRA, SEP	VALUE	LOAN AMT.
Husband:			

Provide most recent statements;
Bring Social Security Statements.

IV. PERSONAL PROPERTY

A. VEHICLES

<u>YR/MODEL</u>	<u>TITLE</u>	<u>LOAN OBLIGOR</u>	<u>DRIVEN BY</u>	<u>VALUE</u>	<u>LOAN AMT.</u>	<u>MO. PAYMNT</u>
_____	H W J	_____	_____	_____	_____	_____
_____	H W J	_____	_____	_____	_____	_____
_____	H W J	_____	_____	_____	_____	_____
_____	H W J	_____	_____	_____	_____	_____

B. OTHER

(List items of personal property which you believe are valuable and should be considered in division of assets).

<u>ITEM</u>	<u>VALUE</u>	<u>CONCERNS</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

V. LIFE INSURANCE

	<u>CARRIER</u>	<u>POL. #</u>	<u>TYPE</u>	<u>VALUE</u>	<u>LOAN</u>
Husband:	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
Wife:	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____

VI. OTHER ASSETS

A. BUSINESS INTERESTS

<u>BUSINESS TITLE</u>	<u>INTERESTS NAME & TYPE</u>	<u>ANNUAL INCOME</u>
H W J	_____	_____
H W J	_____	_____
H W J	_____	_____

B. DEGREES OR LICENSES OBTAINED DURING MARRIAGE.

	<u>DEGREE</u>	<u>DATES</u>	<u>APPROX. COST</u>
H W	_____	_____	_____
H W	_____	_____	_____

C. OTHER

UNSECURED DEBTS

A. Charge accounts, credit cards (list each separately):	<u>Amount Due</u>	<u>Mo. Payment</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. Unpaid taxes currently due:	
_____	_____
_____	_____

C. Other liabilities not itemized above:	
_____	_____
_____	_____
_____	_____

TOTAL LIABILITIES: _____

(Signature)

(This is a confidential form not subject to court subpoena)