

Assets and Liabilities Statement

Spouse's Assets

Real Estate

Principal Residence (if owned)

Street Address _____

Name on Title _____

Current Market Value _____

Acquisition Cost and Date _____

Other Properties Including Land (Make a separate list if more than one other property owned)

Street Address _____

Name on Title _____

Current Market Value _____

Acquisition Cost and Date _____

Rented to _____ Amount of Rent _____

Automobiles, Boats, and Recreational Vehicles

Description	Ownership	Value	Date Purchased
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1. _____

2. _____

3. _____

Investments

Insurance Policies, RRSPs, Stocks, Bonds, Securities, Shares in Small, or Other Businesses, etc.

Because of capital gains implications, also record the date of the purchase and the acquisition costs.

Company	Amount	Identification Number	Beneficiary (if applicable)
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1. _____

2. _____

3. _____

4. _____

5. _____

Money on Deposit

Bank/Trust Company/Credit Union (include address) Account Number Amount

- 1. _____

- 2. _____

- 3. _____

Loans Made to Other People and Needing Repayment

Money lent to Amount Owing Special Notes

- 1. _____
- 2. _____
- 3. _____

Household Goods, Furniture, and Other Assets Including Items Such as Computers, Antiques, Jewellery, and Paintings

Item Beneficiary (if applicable)

- 1. _____
- 2. _____
- 3. _____
- 4. _____

Continue on separate sheet if necessary.

Other Assets Such as Stamp and Coin Collections, and Personal Items of Sentimental Value

Item Beneficiary (if applicable)

- 1. _____
- 2. _____
- 3. _____

Total Value of Assets _____

DATE: _____