

Property Summary (Unmarried Person)



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Client Name(s) _____

Important: Please see second page.

(If you need more room, attach additional sheets.)

<u>Assets</u>	<u>Gross Value</u> ¹	<u>Mortgage</u> ²	<u>Net Value</u> ³	<u>How Title Held</u> ⁴	<u>Date Evidence of Title Delivered to M&G</u>
<i>Real Estate</i>					
1 Residence					
2 2nd residence					
3 Farm					
4 Other real estate, including business realty					
<i>Business, Closely Held</i>					
5 Corporate stock					
6 Partnership units (general and/or limited)					
7 Limited Liability Company (Partnership) units					
8 Entrepreneurship or other _____					
<i>Investments (Not IRAs)</i>					
9 Annuities					
10 Bonds (government and corporate)					
11 Brokerage account					
12 Certificates of deposit					
13 Commodities futures					
14 Contract rights					
15 Money owed you (prom. notes & deeds of trust)					
16 Marital deduction property					
17 Mineral interests					
18 Mutual funds					
19 Patents and copyrights					
20 Powers of appointment					
21 Stocks, public					
22 Stock options, warrants, rights, etc.					
23 Time estates, income interests					
24 Three-year-rule property (2035)					
25 Trust assets, your trust					
26 Uniform transfers to minors assets					
<i>Retirement Funds</i>					
27 IRA					
28 Retirement plan (pension)					
<i>Future interests</i>					
29 Inheritances					
30 Inter-vivos gifts					
31 Time interests, remainders					
<i>Life insurance</i>					
32 On self					
33 On others (Please specify)					
Subtotals	_____	_____	_____	_____	_____

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<i>Cash</i>					
34 Checking					
35 Money market fund					
36 Savings					
<i>Tangible Personal Properties</i>					
37 Vehicles					
38 Guns, jewelry, collections					
39 Household goods					
<i>Other Assets</i>					
40 _____					
<i>Other Liabilities (List more on reverse)</i>					
41 _____					
TOTALS					
Annual Net Income: (Gross) \$ _____ - (Expenses) \$ _____ = (Net) \$ _____					
¹ List fair market value without mortgage ² For indebtedness against property, list balance due on mortgage. List other debts in row 40 and on back side. ³ List difference between gross value and balance due on mortgage (Footnote 1 minus Footnote 2) ⁴ Use: DK = Don't know; TC = tenants in common; JT = joint tenancy; TE = tenants by entireties; SOH = sole owner, husband; SOW = sole owner, wife; IRT = in revocable trust; IIT = in irrevocable trust; LE = life estate; RI = remainder interest; CP = community property					

The information you have furnished will be relied upon by us in making recommendations for the creation or revision of your estate plan, and if the information provided us is either incorrect or incomplete, our recommendations may be inappropriate, inadequate, or worse, harmful. We therefore rely upon you, as we must, to take the necessary time and diligence to place into our hands data which can and will be used by us in helping you meet your objectives. We cannot be responsible for recommendations made or conclusions reached which later prove to be erroneous because of incorrect or incomplete data. Your signature below signifies that we may rely upon the information you have furnished to us on these pages and/or on any attachments thereto in making our recommendations to you, and you hereby release and indemnify us from liability for so relying. Such release and indemnity is binding upon you and your heirs.

Client

Client

Date