

If you have lived outside of California during your marriage, please list the states and estimated dates of residence		
If either of you were previously married, list the dates of prior marriage, name of prior spouse, names of living children from prior marriage and state whether marriage ended due to death or divorce		
Location of Safe Deposit Box (if any) (Bank Name , Address, and Box #)		
Life Insurance Information (company, agent, telephone number and policy number and estimated value/coverage)		
Accountant Information (company, agent, telephone number)		
Financial Planner/Broker information (company, agent, telephone number)		
CHILDREN		
Name	Birthdate	Address

ASSETS		
Type	Current Market Value	Name(s) on Title and Percentage Owned. Is this separate or community property?
Real Estate Owned (Address)		
Bank Accounts Name of Bank, account number, and type of account		
Stocks, Bonds, and Mutual Funds		

Businesses		
Cars/Boats/Rvs, etc		
Retirement Plans- 401k, IRAs, etc – list company holding the plan, current value, and death benefits.		

Other		
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LIABILITIES

<p>List property description, Bank that holds loan, and account number if known</p> <p>Mortgage(s)</p>	<p>Amount Currently Due</p>	
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Car Loans		
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Other Debts	

Please generally advise how you wish to distribute your property – real estate and significant personal property (cars, jewelry, stocks, bonds, cash, IRA, life insurance, retirement accounts, etc).

You:

SPOUSE: