

CURRENT ASSETS LIST

DATE: _____, 20____

I. Identification

First Name _____ Last Name _____

SSN: _____ - _____ - _____

Residency: _____

Citizenship: _____

II. Personal Property & Assets

Motor Vehicles: _____

Boats: _____

Stocks/Bonds: _____

Retirement Accounts: _____

Life Insurance Policies: _____

Trademarks: _____

Copyrights/Patents: _____

Household Inventory: _____



III. Financials

Accounts (Bank Name, Account & Routing Numbers): _____

IV. Real Estate

Property (Ownership): _____

Property (Leasehold): _____

Property (Other): _____

V. Business Entities

Name, State of Incorporation & Ownership %: _____

VI. Other

