

**ASSET ANALYSIS FOR LONG TERM CARE PLANNING - MARRIED**

Name:				As of:	
<b>VALUE OF ASSETS OWNED, AND HOW TITLED</b>					
	Husband	Wife	Joint Spouse with Survivorship	Other	Beneficiary Designations
Checking Accounts					
Savings Accounts					
Money Market Accounts					
Cert's of Deposit					
U.S. Savings Bonds (Total)					

Seen and correct  
to the best of my knowledge

Signature: \_\_\_\_\_

**ASSET ANALYSIS FOR LONG TERM CARE PLANNING - MARRIED**

	Husband	Wife	Joint Spouse with Survivorship	Other	Beneficiary Designations
Stocks & Bonds & Brokerage Acc'ts					
Mutual Funds					
Notes Receivable					
Annuities					
Business Interests					

Seen and correct  
to the best of my knowledge

Signature: \_\_\_\_\_

**ASSET ANALYSIS FOR LONG TERM CARE PLANNING - MARRIED**

	Husband	Wife	Joint Spouse with Survivorship	Other	Beneficiary Designations
Tax Ass'd Value Real Estate Residence					
(Also note any mortgage)					
IRA/401(k)/Keogh/SEP					
Ltd. Partnerships					
Vehicle 1					
Vehicle 2					
Burial Arrangements					
Pers. Prop. of Unusual Value					
Other					
Cash Value of Life Insurance					

Seen and correct to the best of my knowledge

Signature: \_\_\_\_\_

**ASSET ANALYSIS FOR LONG TERM CARE PLANNING - MARRIED**

	Husband	Wife			
Gross Income per Month					
Social Security					
Retirement					
Investment					
Annuities					
Other					
<b>TOTAL GROSS MONTHLY INCOME</b>					

Seen and correct  
to the best of my knowledge

Signature: \_\_\_\_\_

**ASSET ANALYSIS FOR LONG TERM CARE PLANNING - MARRIED**

Gifts given over last five years	Approximate date	Approximate value			
Debts Owed	Approx. amt.	Payoff sched.	Est. payoff date		

Seen and correct  
to the best of my knowledge

Signature: \_\_\_\_\_