Section 2 - Property *(Schedule A/B)*

Separately list and describe assets in each category below. List an asset only once. If an asset fits in more than one category, list the asset in the category where you think it fits best. If more space is needed, attach a separate page to this questionnaire.

Part A. Residence, Building, Land, Other Real Estate

Address and Description of Property	**List all mortgages, home equity loans and other liens against the property:** Please provide details requested below.	Estimated **Value** of Property	**Owned by:** You, your spouse, both you and your spouse, you and at least one person other than your spouse.	**If you are not the only owner:** Please enter the % of the property you own.	**Office Use Only:** *Exemptions?*
Address: What is the property? Check all that apply. ☐ Single-family home ☐ Duplex or multi-unit building ☐ Condominium or cooperative ☐ Manufactured or mobile home ☐ Land ☐ Investment property ☐ Timeshare ☐ Other:	Who issued the mortgage, lien or loan? *(Name and Address)* What is the amount of the mortgage, lien or loan? What is your current interest rate on the loan? What is your monthly payment? Does payment include taxes and/or insurance? ☐ No ☐ Yes How many payments are left?		☐ You ☐ Spouse ☐ Joint ☐ Other:		
Address: What is the property? Check all that apply. ☐ Single-family home ☐ Duplex or multi-unit building ☐ Condominium or cooperative ☐ Manufactured or mobile home ☐ Land ☐ Investment property ☐ Timeshare ☐ Other	Who issued the mortgage, lien or loan? *(Name and Address)* What is the amount of the mortgage, lien or loan? What is your current interest rate on the loan? What is your monthly payment? Does payment include taxes and/or insurance? ☐ No ☐ Yes How many payments are left?		☐ You ☐ Spouse ☐ Joint ☐ Other:		

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Part B. Cars, Vans, Trucks, Tractors, SUVs, Motorcycles, RVs, Watercraft, Aircraft, Motor Homes, ATVs, Other Vehicles

Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse	Office Use Only *Exemptions?*
Vehicle #1	☐ No ☐ Yes	Year: _____ Make: _____ Model: _____ Mileage: _____ Other Information:		☐ You ☐ Spouse ☐ Joint ☐ Other:	
Vehicle #2	☐ No ☐ Yes	Year: _____ Make: _____ Model: _____ Mileage: _____ Other Information:		☐ You ☐ Spouse ☐ Joint ☐ Other:	
Vehicle #3	☐ No ☐ Yes	Year: _____ Make: _____ Model: _____ Mileage: _____ Other Information:		☐ You ☐ Spouse ☐ Joint ☐ Other:	
Watercraft/Aircraft/Motor Homes/ATVs/Other (*list year, make, and model*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Part C. Personal and Household Items

Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse.	Office Use Only *Exemptions?*
Household Goods and Furnishings (*Major appliances, furniture, linens, china, kitchenware, etc.*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Electronics (*TVs, stereos, computers, game consoles, tablets, iPods, mobile phones, etc.*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Collectibles of value (*art, paintings, prints, memorabilia, antiques, stamp/coin/card collections, etc.*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Sports, photo, exercise, and other hobby equipment; musical instruments	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Firearms, ammunition, and related equipment	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Clothing (*everyday clothes, furs, leather coats, designer wear, shoes, accessories*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Jewelry	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Pets/non-farm animals	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse	Office Use Only *Exemptions?*
Health aids and all other household items not listed	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

Part D. Financial Assets

Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse	Office Use Only *Exemptions?*
Cash (*spare change/money in your purse or wallet, cash not in accounts*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Checking account #1 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Checking account #2 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Savings account #1 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Savings account #2 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse	Office Use Only *Exemptions?*
Certificate of deposit (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Other financial account #1 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Other financial account #2 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Other financial account #3 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Other financial account #4 (*list name(s) on account, bank name, and account number*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Bonds, mutual funds, and publicly traded stocks	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Non-publicly traded stocks and interests in businesses, corporations, LLCs, partnerships, and joint ventures (*list % of ownership*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Government and corporate bonds and instruments (*including U.S. Savings Bonds*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse	Office Use Only *Exemptions?*
Retirement, pension, or profit-sharing plan #1 (*IRA, 401(k), 403(b), thrift savings account, or other pension or profit-sharing plan*) (*list type of plan and where the account is held*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Retirement, pension, or profit-sharing plan #2 (*IRA, 401(k), 403(b), thrift savings account, or other pension or profit-sharing plan*) (*list type of plan and where the account is held*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Retirement, pension, or profit-sharing plan #3 (*IRA, 401(k), 403(b), thrift savings account, or other pension or profit-sharing plan*) (*list type of plan and where the account is held*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Security deposits (*typically with landlord or utility*) (*list holder*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Prepayments (*prepaid rent, layaway, gift cards, etc.*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Annuities (*list company*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Education IRA, Sec. 529 or Sec. 530 account, state tuition plan	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Trusts, life estates, future, and equitable interests in property or assets	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse	Office Use Only *Exemptions?*
Patents, copyrights, trademarks, trade secrets, and other intellectual property	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Licenses, franchises, and other general intangibles	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Tax refunds owed to you (*list years due*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Alimony and child support	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Other amounts someone owes you (*unpaid wages, disability benefits, sick pay, vacation pay, workers' compensation, unpaid loans made by you, etc.*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Cash value of insurance policies (*whole or universal life, health, disability, HSA, etc.*) (*list insurance company and beneficiary*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Inheritances, estate distributions, and death benefits	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Personal injury claims or awards	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse.	Office Use Only *Exemptions?*
Lawsuits or claims against anyone for anything	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
All other claims or rights to sue someone	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Any other financial asset not listed	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Part E. Business-Related Assets

Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse.	Office Use Only *Exemptions?*
Accounts receivable or commissions earned (*list*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Office equipment, furnishings, and supplies (*list*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Machinery, fixtures, equipment, business supplies, and tools of your trade (*list*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Business inventory (*list*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Interests in partnerships or joint ventures (*name and type of business, % interest*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Customer and mailing lists	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Other business-related property not already listed	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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Part F. Farm and Commercial Fishing-Related Property

Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse.	Office Use Only *Exemptions?*
Farm animals (*livestock, poultry, farm-raised fish, etc.*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Crops (*growing or harvested*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Farm and commercial fishing equipment, implements, machinery, fixtures, and tools of trade (*list*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	
Farm and commercial fishing supplies, chemicals, and feed (*list*)	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

Part G. Miscellaneous

Type of Property	Do you own this type of property?	Description	Value of Property	Owned by: You, your spouse, both you and your spouse, you and at least one person other than your spouse.	Office Use Only *Exemptions?*
All other property of any kind not previously listed	☐ No ☐ Yes			☐ You ☐ Spouse ☐ Joint ☐ Other:	

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