

ASSET PROTECTION WORKSHEET

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Add You need to protect your assets to secure your financial future and to provide for those you love. Get started by answering the following questions. All questions should be answered as they apply to you and/or your spouse.

1. What is your marital status? _____

2. Have you ever been divorced? Is so, do you pay child support and/or alimony?
If yes..... To Whom: _____ Amount: _____

3. Are you receiving any government benefits such as Social Security, disability, or VA benefits? If yes, please explain.

4. Are you receiving any retirement benefits, such as pension benefits? If yes, please explain.

5. Are you the beneficiary of a trust? If yes, please explain.

6. What was your adjusted gross income for the past three years? _____

What steps have you taken to protect your personal assets? You must prepare for the future today.



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7. Do you own any life insurance policies? If yes.....

Type: _____

Cash Value: _____

Death Benefit Value: _____

8. Do you have longterm care insurance? _____

9. Do you own real property? If yes, please explain and provide current market values. _____

10. Please provide the current value of all funds held in financial accounts.

11. Do you own a business or an interest in a business? _____

What is the legal structure of the business (corporation, LLC, partnership)? _____

What is the approximate value of your interest in the business? _____

Are you personally liable for debts of the business? _____

12. Do you own stocks, bonds, or other securities and what is the total value?

13. Do you own an IRA, 401(k) or other retirement account? What's the value?

14. Please describe any motor vehicles, RVs, boats etc. you own and the current value.



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15. Please provide the current value of all household furnishings and other personal property not included elsewhere.

16. Do you anticipate receiving an inheritance at some point in the future? If yes, please explain.

17. Are you currently involved in any lawsuits? If yes, please explain.

18. Have you ever filed bankruptcy? If yes, when and what chapter

19. How many children do you have? Ages? Are they married?

20. Do you have any chronic health concerns at the moment? If yes, please explain.
