Confide	ntial Perso	onal Qu	estionnai	re		UPDATED	·
Taxable Inves	stment Assets						
Description	Current	Cost	Annual	Owner	% Growth	Firm	Notes
,	Value	Basis	Contribution				
Checking							
Savings							
Non Qualifed Investments							
Tax-Deferred A	Assets (e.g. Ar	nuities, ol	d 401(k), etc.,)			
Description	Current Value	Cost Basis	Annual Contribution	Owner	% Growth	Firm	Notes
							·
							-
Current 401(k)	or Qualified	Plan				,	
Description	Current Value	Owner	Annual Contribution	Match % or \$	% Growth	Firm	Notes
	Cost Basis	Roth/Trad	Rollover \$	Loan	Loan Payback	Loan %	
Description	Current		Annual	Match	0/ 64	F:	Notes
Description	Value	Owner	Contribution	% or \$	% Growth	Firm	
	Cost Basis	Roth/Trad	Rollover \$	Loan	Loan Payback	Loan 9/	
	COST Dasis	KUUI/ IFAQ	κοπονει φ	LUali	LUGII I AYDACK	LUAII /0	

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Confid	lential	Personal (Oue	stion	inaire

UPDATED:

Personal & Business Assets

Description	Current Value	Cost Basis	Annual Contribution	Owner	% Growth	Firm	Notes
Personal Home							
							·
							·
							·
							·
							·
							·

NOTES:

Personal & Business Assets



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Confic	ontia	Personal		Mostio	DESTRO
				40(=510(0)	
			~~	J. J. J. J.	

UPDATED:

Liabilities

Description	Amount Owed	Max Limit	Minimum Payment	Actual Payment	Person Liable	Interest Rate %	Time Remaining
TOTALS							

NOTES:

Liabilities

GWS&A