

BEAUCHAMP, KELLY, WHIPPLE,  
ZICK, KEYES & HULEWICZ, P.L.L.C.  
627 Fort Street  
Port Huron, Michigan 48060  
(810) 987-4111

**PERSONAL ASSET AND DEBT SCHEDULE**  
**(Confidential)**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**REAL ESTATE**

Location and Description	How Owned	Market Value

**PERSONAL ESTATE**

**JEWELRY:** (Briefly describe and give estimated value. Itemize on reverse side if necessary.)

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**HOUSEHOLD FURNISHINGS AND EQUIPMENT:** (Briefly describe and give estimated value.)

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**MOTOR VEHICLES:** (Include mobile homes, campers, motorcycles, snowmobiles, etc.)

Type and Make	How Owned	Current Value

**OTHER PERSONAL PROPERTY:** (Boats, guns, collections, etc.)

Type	How Owned	Current Value

**BANK ACCOUNTS**

Include Certificates of Deposit.

Bank, Type and Account Number	How Owned	Current Value

**SECURITIES**

Include stocks, bonds, debentures, etc., including stock in your own company. (Continue on reverse side or separate schedule if necessary.)

Company Name	Common or Preferred	How Owned	Quantity

Do you have information as to the date each security was acquired by you, how you acquired it (i.e. gift, purchase, inheritance, stock split, etc.), the basis for each security (i.e. cost, donor's basis, etc.)? \_\_\_\_\_  
If so, please provide us with this information.

**PENSION/PROFIT SHARING PLANS**

Name of Employer: \_\_\_\_\_

Type of Plan(s): \_\_\_\_\_

Do you contribute any of your earnings to it? \_\_\_\_\_ If so, please tell us how much, if you can. \_\_\_\_\_

**LIFE INSURANCE ON YOUR LIFE**

Company Name	Face Amount	Owner	Beneficiary

**BUSINESS INTERESTS**

Are you the owner or part owner of any unincorporated business? \_\_\_\_\_ If so, please give us the name and address of the business, type of business, your interest in it (sole proprietor, partner, etc.), and the names of

other owners, if any (i.e. partnership agreement, etc.). If there are written documents, please permit us to make copies of them.

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**GIFTS**

Have you ever filed any U.S. Gift Tax Return(s) (Form 709) during your life? \_\_\_\_\_ If so, please permit us to make copies of it/them.

Have you made any gifts in one year to anyone over \$10,000.00? \_\_\_\_\_

Have you inherited any assets within the past ten (10) years? \_\_\_\_\_

**OTHER**

Any assets not included above.

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**DEBTS**

Major debts only.

Name of Creditor	Type of Debt	Current Balance