



If you placed an in the NO or NOT SURE box in question 3, answer all of the following questions. If you are married and living with your spouse, you must answer all of the questions for both of you.

4. Please enter the money amounts of all bank accounts, investments or cash that either you, your spouse, if married and living together, or both of you own in the boxes below. Include items that either of you own with another person. Include only the dollar figures, not the account number. If you or your spouse do not own an item listed, either separately, jointly or with another person, place an in the **NONE** box.

• Combined total of all bank accounts (checking, savings and certificates of deposit)	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Combined total of all stocks, bonds, savings bonds, mutual funds, Individual Retirement Accounts or other similar investments	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Any other cash at home or anywhere else	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>

5. Do you own life insurance policies with a total face value of more than \$1,500? Answer for you and your spouse if your spouse lives with you.

If you answer **NO** for both you and your spouse, go to question 6.

YOU: **YES** **NO**

SPOUSE: **YES** **NO**

If you answered **YES** for either of you, how much money would you get if you turned in your policies for cash right now? Enter the amount. If you answered **YES** for both you and your spouse, enter the combined amount. This is not the face value of your policies. You may need to call your insurance company to help answer this question.

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6. Will some money from the sources listed in **questions 4 and 5** be used to pay for funeral or burial expenses? **If YES, skip to question 7.**

If **NO**, place an in the **NO** box, then go to question 7.

YOU: **NO**

SPOUSE: **NO**

7. Other than your home and the property on which it is located, do you or your spouse, if married and living together, own any real estate? Examples of other real estate are summer homes, rental properties or undeveloped land you own.

YES **NO**