

Presented by: Your Financial Advisor

Prepared for:

	Bank Accounts	
	Bank 1	Bank 2
Name of Bank		
Address		
Telephone Number		
Account Number		
Bank Officer		
Average Balance	\$	
Type of Account (Checking, Money Market, Savings)		
Ownership of Account (Individual, Joint, Joint and Survivorship)		
(Individual, Joint, Joint and		
(Individual, Joint, Joint and	Brokerage Accounts	Brokerage 2
(Individual, Joint, Joint and Survivorship)	Brokerage Accounts Brokerage 1	Brokerage 2
(Individual, Joint, Joint and		Brokerage 2
(Individual, Joint, Joint and Survivorship)  Firm Name		Brokerage 2
(Individual, Joint, Joint and Survivorship)  Firm Name		Brokerage 2
(Individual, Joint, Joint and Survivorship)  Firm Name  Address		Brokerage 2
(Individual, Joint, Joint and Survivorship)  Firm Name Address  Telephone Number		Brokerage 2
(Individual, Joint, Joint and Survivorship)  Firm Name Address  Telephone Number Account Number		Brokerage 2
(Individual, Joint, Joint and Survivorship)  Firm Name Address  Telephone Number Account Number Broker		Brokerage 2

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