

# The Welch Group, LLC

## Asset/Liability Review

Client 1: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Client 2: \_\_\_\_\_ Date of Birth \_\_\_\_\_

	Client 1	Client 2	Joint
<b>Cash on hand and in banks:</b>			

<b>Investments:</b>			

<b>Cash value of life insurance:</b>			

<b>Real estate:</b>			

<b>Mortgages payable:</b>			

<b>Sources of Income</b>			

<b>Potential Inheritances/ Settlements</b>			

<b>Annual Amount Available for Savings and/or Investing</b>			
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