

Before Gregory J. Spadea can prepare your will you should fill in the checklist below and bring it to your appointment. If you have any questions please call Mr. Spadea at 610-521-0604.

<b>TOTAL RETIREMENT SAVINGS / INVESTMENTS AND TANGIBLE ASSETS</b>			
<b>INVESTMENTS</b>	<b>CURRENT VALUE</b>		
<b>Personal Assets</b>	<b>Husband</b>	<b>Wife</b>	<b>Joint</b>
Saving Accounts, Checking Accounts, CDs	\$	\$	\$
Taxable Mutual Funds	\$	\$	\$
Annuities (fixed and variable)	\$	\$	\$
IRAs, Rollover IRAs, Roth IRAs	\$	\$	\$
Short-Term Securities (i.e. cash/money markets)	\$	\$	\$
Bonds (i.e. bonds and bond funds)	\$	\$	\$
Stocks (i.e. stocks and stock funds)	\$	\$	\$
Other _____	\$	\$	\$
<b>Employer Sponsored</b>			
401(k)s, 403(b)s, SEPs	\$	\$	\$
Life Insurance			
Pension Plans (per year)	\$	\$	\$
<b>Potential Assets</b>			
Inheritance	\$	\$	\$
Real Estate (property sales)	\$	\$	\$
<b>TOTAL RETIREMENT SAVINGS / INVESTMENTS AND TANGIBLE ASSETS</b>			

List all debts including mortgages, student loans and credit cards and include balance due and monthly payment.